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THE 1988 NEW YORK HISPANIC MARKET

Strategy Research Corporation ®

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FOREWORD

This Study, THE 1988 NEW YORK HISPANIC MARKET, is the most recent in the series of Hispanic Market Studies conducted and published by Strategy Research Corporation over the past twelve years. It is the third Study dealing with the New York area.

This series of Studies conducted by Strategy Research Corporation presents current population data, market profile information, shopping pattern data, and product usage information to the marketing practitioners of the U.S. These data have been used by public and private sector demographers, planners and marketers to develop reliable and effective programs.

THE CITY OF NEW YORK
OFFICE OF THE MAYOR
NEW YORK, N.Y. 10007

February 10, 1988

To All in Attendance
"The 1988 New York Hispanic
Market Study"
The New York Hilton Hotel
New York, NY 10019

Dear Friends:

On behalf of the City of New York, I am pleased to extend greetings and best wishes to the sponsors and participants of "The 1988 New York Hispanic Market Study." I am delighted that I have been asked to write a letter of introduction to this most needed endeavor. I am sure it will provide richer knowledge of New York's Hispanic community -- a dynamic segment of New York's past, present and growing future.

The diverse Hispanic community has made significant contributions to the continuous economic growth and prosperity of the City.

New York's vibrant Hispanic community is producing outstanding leaders in the Arts, in the Humanities and in Business. The large and growing pool of Hispanic professionals -- bilingual and bi-cultural -- are ideal role models, and add countless success stories to New York's community. Their culture, ideas and values help in making New York a fascinating place to live, work and visit.

New Yorkers, and in particular the Hispanic community, join me as I express my appreciation to the sponsors of "The 1988 New York Hispanic Market Study" and to Strategy Research Corporation for preparing the report.

All the best.

Sincerely

Ed Koch

Edward I. Koch
MAYOR

PREFACE

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Affiliated with the New York City Partnership, Inc

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February 10, 1988

PREFACE

THE 1988 NEW YORK HISPANIC MARKET STUDY

Dear Readers:

It is a privilege to contribute this introduction to the 1988 edition of The New York Hispanic Market Study.

A recent report by the National Chamber Foundation, an affiliate of the U.S. Chamber of Commerce, concluded that "Quietly, steadily, Hispanic Americans have been on the move, building businesses, making jobs and creating wealth. They have proven themselves to be people with talent, drive, and a taste for success."

Within three decades, Hispanics have become an economic force in New York, making significant contributions to the continued economic growth of the tri-state area. Manufacturers and advertisers no longer need to be reminded of the potential of the Hispanic community. The question no longer is, "How important is this market?" but "How can we keep up with it?" or even "What can we learn from it?"

Until recently, data on the New York Hispanic Market was limited. As President and Chief Executive Officer of the New York Chamber of Commerce and Industry and the New York City Partnership, Inc., I welcome this effort by Strategy Research Corporation to help businesses understand the dynamics of the Hispanic Market.

Sincerely,

Ron Shelp

Ronald K. Shelp

Serving New York City Business Since 1768

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I. PURPOSE, SCOPE AND METHODOLOGY

A. PURPOSE OF THE STUDY

New York is one of the most cosmopolitan cities of the world. The size, composition and diversity of the New York population make this a unique and attractive market. Adding the spending power of the area, the concentration of multi-ethnic businesses, makes New York a demanding, specialized and highly competitive market.

Of the cities in the United States, New York has traditionally been the city which received the major share of the immigrants to this country. Many of the immigrants settled in the area. The years following World War II have seen a complete change in the character of the immigration to this country. Europe ceased to be the dominant source of immigrants: U.S. immigration was fed increasingly from Asian and Hispanic sources. Since the 1960s, Hispanics have come to make up about one-third of all immigrants. Considered in terms of its Hispanic population, the New York area is the nation's second largest ADI (Area of Dominant Influence), after Los Angeles. This *1988 New York Hispanic Market Study* estimates the current Hispanic population of the New York area at more than 2.5 million.

The objective of this Study is to provide up-to-date data on this large and growing market that offers marketers scope, opportunity and challenge. We have addressed this objective by considering and evaluating several key aspects of this market:

- Demographic characteristics: what is the size of the Hispanic market? What are the components and countries of origin of the New York area Hispanics? How long have they lived in the area?
- Social characteristics: how do the Hispanics and Non-Hispanics compare across a range of social/lifestyle behavior, including family, size, work, education and language usage?
- Purchase and ownership patterns: how do Hispanics and Non-Hispanics compare with respect to their priorities and habits in financial expenditure?

To attain these objectives, Strategy Research Corporation planned a Study using as a basis the Survey Research Methodology. We employed a carefully studied and comprehensive Sample design, constructed and tested a detailed Questionnaire which incorporated the areas and topics of concern, and implemented effective Fieldwork controls throughout the data gathering phase of the Study.

The results of this planning have given us, in this *1988 New York Hispanic Market Study*, a thoroughly valid, detailed and up-to-date basis for marketing and selling to this unique and dynamic sector.

B. SCOPE OF THE STUDY

The universe for this Study was the population in the 28-county New York ADI. The counties, listed by state, are as follows:

New York	New Jersey	Connecticut	Pennsylvania
Bronx	Bergen	Fairfield	Pike
Dutchess	Essex		
Kings	Hudson		
Nassau	Hunterdon		
New York	Middlesex		
Orange	Monmouth		
Putnam	Morris		
Queens	Ocean		
Richmond	Passaic		
Rockland	Somerset		
Suffolk	Sussex		
Sullivan	Union		
Ulster			
Westchester			

This 28-county area has a total population of 19,415,900.

The Study sample was designed to give a 2:1 ratio of Hispanics to Non-Hispanic residents of this market.

C. METHODOLOGY

Strategy Research Corporation conducted both primary and secondary research in the gathering of information provided in this Report.

Secondary data sources are cited such as the publications of the U.S. Department of Commerce, Bureau of the Census, including both census findings and projections. State and Federal sources were also used, as well as material from Government sources dealing with Hispanics in the United States.

Population totals are drawn from U.S. Department of Commerce, Bureau of the Census published reports. Population forecasts utilized in the Study were made by Strategy Research Corporation.

With regard to the primary data presented in this Study, the methodology utilized was the Survey Research Method.

The Study was based on 1,500 personal, face-to-face interviews with heads of household. Of these, 1000 interviews were conducted with heads of household in Hispanic households, and 500 interviews were conducted with heads of household in Non-Hispanic households.

The sampling method utilized a stratified, segmented, random probability sample of households. Actual interviews were conducted in eleven counties in the New York/New Jersey area: Kings, Queens, Manhattan, Bronx, Essex, Nassau, Passaic, Union, Hudson, Bergen and Westchester.

The sample was drawn by Strategy Research Corporation's professional sampling staff. A Clustering technique was used, procedural in samples for in-home interviews. The sampling cluster points were actual Census blocks designated by the Bureau of the Census. SRC maintains currently updated Census block, Census tract, and household data for survey and economic research purposes. A random probability sample was pulled, using a random starting point and a sequential interval of persons.

Once a random skip pattern was established, sampling points were assigned to their appropriate Census blocks. These statistics were transferred to Census block maps and then to street maps. For each block, one of six random house selection patterns was chosen randomly, and individual block maps were labeled with street names, starting points, skip patterns, and rotation directions. Nine interviews were completed within each cluster, which consists of one sample block.

All survey data was obtained from personal, in-home, face-to-face interviews. These interviews were conducted by trained, professional interviewers of Strategy Research Corporation, working under the direct supervision of Strategy Research Corporation staff Field Supervisors. Spanish- and English-language versions of the Study questionnaire were prepared. Interviews among Latins were conducted by Hispanic[1], bilingual interviewers.

---

[1] For purposes of this Study, the terms Latin and Hispanic will be used interchangeably. The definition of a Latin (Hispanic) is a person who designates himself or herself to be of Latin (Hispanic) origin or of Latin (Hispanic) ancestry. This is the same definition currently employed by the Bureau of the Census.

A minimum of 20 percent of each interviewer's work was validated daily by staff Supervisors of Strategy Research Corporation. All questionnaires were then carefully edited, coded and prepared for computer tabulation. All programming and data processing was done in-house.

Interviewing for this Study was conducted between November 23 and December 6, 1987.

II. THE HISPANIC UNIVERSE

A. INTRODUCTION

The mix of immigrants through and to New York has shifted over the years, with first one ethnic group, and then another, predominating. The Immigration and Nationality Act of 1952 (the Walter-McCarren Act) was amended in 1965 and resulted, among other things, in a shift of the balance away from European immigration. Statistics from the U.S. Immigration and Naturalization Service show that in the period 1981 - 1984, immigration to the United States from Central and South America was nearly two and a half times as large as European immigration over the same period.

The United States has the sixth largest Hispanic population in the world, after Mexico, Spain, Argentina, Colombia and Peru. Currently, the New York ADI represents the second ranked (after Los Angeles) Hispanic market in the United States. The New York area has a projected 1988 Hispanic population of just over 2,500,000 persons. This is equivalent to about 13% of the total United States Hispanic population.

The Hispanic population of New York is most heavily concentrated in the Bronx, Kings, Manhattan and Queens: approximately 66% of Area Hispanics live in these four areas of New York.

Data on trending and distribution of the New York Hispanic population are taken from the 28-County area making up the New York ADI and are based on 1980 Bureau of the Census figures. The Counties are, in New York, Bronx, Dutchess, Kings, Nassau, New York, Orange, Putnam, Queens, Richmond, Rockland, Suffolk, Sullivan, Ulster and Westchester. There are also twelve New Jersey counties, Bergen, Essex, Hudson, Hunterdon, Middlesex, Monmouth, Morris, Ocean, Passaic, Somerset, Sussex and Union. Finally, the area includes Fairfield County in Connecticut and Pike County in Pennsylvania. In the text we use the terms "Latin" and "Hispanic" interchangeably. The sections that follow describe the history of the New York Latin market and trace its growth and increasing diversification in the context of the area's recent population history.

B. HISTORY OF NEW YORK'S HISPANIC MARKET

New York has always been the No.1 point of entry for immigrants to the U.S since the last century. It is also traditionally the largest single city of residence for new arrivals, giving it the largest proportion of immigrant residents of any U.S. city, until Miami overtook it in this respect in the 1960s. Despite basic characteristics in common, the Hispanic population is a mosaic of nationalities, some historically well established in the U.S., others relative newcomers to this country. Their motives for choosing the United States as their home are varied: some come in search of economic opportunity and betterment; others, to try to offer their children education and career opportunities; of the more recent arrivals, many are looking for a refuge from political unrest and persecution in their countries.

PUERTO RICO

Puerto Ricans (the second largest Hispanic ethnic group in the United States), traditionally form the dominant Hispanic nationality in New York: Puerto Ricans make up approximately half of the Hispanic population. Both the size of this community and its long established character, as well as its close ties to the United States, are due not only to proximity to the United States but also to the fact that Puerto Ricans are not subject to immigration restrictions. Nevertheless, the growth of immigration from the island was comparatively modest before 1940. The first U.S. Bureau of the Census count of Puerto Ricans in 1940 reported 69,967 in the entire U.S., most of them in the New York area. High unemployment and rapid population growth in Puerto Rico made the booming, post-war U.S. an attractive alternative. By 1950, the number of Puerto Ricans in the U.S. had more than quadrupled, to more than 300,000.

By 1960, the number of Puerto Ricans in the U.S. had nearly tripled again, reaching almost 900,000. The rate of growth of the Puerto Rican population in the continental U.S. slowed considerably, beginning in the late 1960's. By 1970, 1.4 million lived in the U.S., the majority of them in the New York area. Ten years later, in 1980, the number of people in the U.S. of Puerto Rican origin exceeded the 2 million mark. Despite a slower growth rate, Puerto Ricans in the U.S. are currently estimated to number over 2.7 million. Of these, approximately 1.1 million live in the New York area.

Despite the slowing down of Puerto Rican migration since the 1960's, the Latin population of the New York area has not only increased markedly but also become more diverse with the addition of a new wave of Latin American immigrants. The immigration of large numbers of Latin Americans into New York began in the early 1960's as a result of economic conditions in Central and South America and the Dominican Republic, as well as of changes in U.S. immigration laws and policies. These new arrivals were part of a dramatic shift in the make up of immigrants arriving in this country. Earlier immigrants came mostly from Europe, but the "new immigration" was composed largely of Latin Americans and Asians. The new Latin American immigrants have come for both economic and political reasons. Most express a desire to return someday to their homeland.

DOMINICAN REPUBLIC

Now in second place among the New York area Hispanic nationalities are people from the Dominican Republic. Like Puerto Rico, the Dominican Republic suffers from high unemployment and rapid population growth. Dominican immigration into the U.S. began to increase after 1961 when the restrictions imposed by the former Trujillo government were eliminated. By the 1980's Dominicans made up 26% of New York Hispanics, the second largest Hispanic group. Over 700,000 Dominicans are currently living in the New York area.

CUBA

Unlike those of Puerto Rican and Dominican origin, Cubans came to the U.S for political reasons. In terms of numbers, they follow Central and South Americans as the most important Hispanic group in the New York area. Most Cubans fleeing that country's revolution have settled in South Florida, but there are also strong communities in the New York area, principally in Union City and in West New York. Now, in 1988, there are approximately 132,600 Cubans in the New York area.

COLOMBIA

Colombians are the fastest growing Hispanic group in New York. Current estimates are that there are almost 110,000 Colombians in the New York area, and this figure may underestimate the total number.

CENTRAL AND SOUTH AMERICA

Central and South Americans are an increasingly important part of the Latin population. They currently comprise just under 20% of the area population, and their numbers are approaching a half million. The numbers of Nicaraguans, Salvadoreans and others have grown rapidly over the past five years, fuelled by political uncertainty and economic crisis in their countries. There is every indication that their numbers will continue to grow as the problems that led them to leave continue unabated.

MEXICO/SPAIN

Mexicans and Spaniards round off the Hispanic groups in the New York area. Mexicans in the U.S. are concentrated in the West Coast, the Southwest, and some urban areas of the Midwest. The number of Mexicans in the New York area is still relatively small in 1988 (under 60,000). Recent trends and population movements suggest that the number of Mexicans in the New York area might increase substantially in the future. As Mexicans have moved out of agricultural occupations in recent decades, they have tended to move eastwards into such cities as Chicago. It is conceivable that as this trend continues, Mexicans seeking opportunities will move to the Northeast in larger numbers.

C. POPULATION CHANGE IN THE NEW YORK AREA 1960 - 1988

The population of the New York area increased by nearly three million people between 1960 and 1988, following the traditional growth pattern. Nevertheless, we must keep in mind that between 1970 and 1980 an actual *decrease* of approximately 600,000 people occurred. The move from the city towards the suburbs, together with economic problems were major factors in the decline. This negative shift was most evident in the older urban areas, while many of the suburban counties showed substantial growth. For example, Bronx County lost over 20% of its population between 1970 and 1980 according to the Bureau of the Census. Kings County lost over 14% of its population and New York County, 7.3% of its population. By contrast, Ocean County, NJ, registered a 66% increase in population.

GROWTH OF NEW YORK POPULATION
1960 - 1988
TWENTY EIGHT COUNTY AREA (ADI)

Year	Population	Change
1960	16,523,720	
1970	18,496,737	11.9%
1980	17,898,045	-3.2
1988	19,415,900	8.5

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Overall, between 1980 and 1988, the population in the New York area is estimated to have increased by more than 1.5 million.

D. HISPANIC POPULATION GROWTH IN THE NEW YORK AREA:1970 - 1988

Hispanic population growth in the New York area has increased by nearly 490,000 over the past eight years, a 23.6% rise. By comparison, the Non-Hispanic segment has grown by more than one million, an increase of 6.5%. The New York Hispanic population continues to show steady growth; however, these latest figures show that the increase in the Non-Hispanic population is at a pace below that of the Hispanic segment.

POPULATION IN NEW YORK
1970 - 1988
TWENTY EIGHT COUNTY AREA (ADI)

	Hispanic		Non-Hispanic		Total	
Year	Number	Percent	Number	Percent	Number	Percent
1970	991,900	5.4%	17,504,837	94.6%	18,496,737	100.0%
1980	2,063,100	11.5	15,833,845	88.5	17,896,945	100.0
1988	2,550,800[1]	13.1	16,865,100	86.9	19,415,900	100.0

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The percentage of Hispanics in the New York ADI is now 13.1%.

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[1] Recent studies by the City of New York indicate that the illegal component of these census based statistics could be considerably higher than previously estimated.

E. HISPANIC CONTRIBUTION TO DEMOGRAPHIC GROWTH : 1970 - 1988

From 1970 to 1980 the Hispanic population shows a substantial growth of over 100%, at the same time as the Non-Hispanic population decreased by nearly 10%. However, the 1988 estimates show a changing picture: Hispanic growth from 1980 to 1988 continues, although not at the rate of the previous ten years. At the same time, there is a significant increase in the size of the Non-Hispanic population, which reverses the diminishing trend seen over the period 1970 to 1980.

HISPANIC VS. NON-HISPANIC
POPULATION GROWTH IN NEW YORK
1970 - 1988
TWENTY EIGHT COUNTY AREA (ADI)

	1970	1980	Net Change 1970-1980	Percent Change 1970-1980	1988	Net Change 1980-1988	Percent Change 1980-1988
Non-Hispanic	17,504,837	15,833,845	-1,670,992	-9.5%	16,865,100	1,031,255	6.5%
Hispanic	991,900	2,063,100	1,071,200	108.0	2,550,800	487,700	23.6
TOTAL	18,496,737	17,896,945	-599,792	-3.2%	19,415,900	1,518,955	8.5%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Increases on the part of both Hispanic as well as Non-Hispanic populations push the total 1988 New York ADI population to nearly 19.5 million.

F. THE NEW YORK LATIN MARKET

All 28 of the counties in the New York ADI showed increases in Hispanic populations since 1980. These increases range from about 15% to 300%. The three counties with the highest percentages of Hispanics are, as in 1980, Bronx (38.9%), Hudson (31.0%), and New York County (26.7%). The largest numerical increase in Hispanic population - over 100,000 - was seen in Queens County.

HISPANIC POPULATION GROWTH IN NEW YORK
1980 - 1988

State	1980 Hispanic Population	1988 Hispanic Population	1980-1988 Percent Increase	Percent Hispanic 1988
New York				
Bronx	396,700	459,300	15.8%	38.9%
Dutchess*	5,900	7,500	27.1	2.5
Kings	392,100	460,300	17.4	20.1
Nassau	43,300	56,500	30.5	4.3
New York	335,800	406,400	21.0	26.7
Orange	11,300	14,100	24.8	4.8
Putnam	1,300	1,600	23.1	1.7
Queens	262,400	362,700	38.2	17.1
Richmond	18,900	24,200	28.0	6.0
Rockland	11,800	14,700	24.6	5.0
Suffolk	58,700	73,600	25.4	5.3
Sullivan*	2,700	3,300	22.2	4.6
Ulster*	4,900	6,100	24.5	3.4
Westchester	45,600	64,000	40.3	6.3
New Jersey				
Bergen	28,500	37,400	31.2	4.1
Essex	76,600	93,400	21.9	10.4
Hudson	145,200	185,500	27.8	31.0
Hunterdon	1,000	1,300	30.0	1.0
Middlesex	34,100	43,000	26.1	6.6
Monmouth	12,900	17,200	33.3	3.0
Morris	11,000	14,100	28.2	3.2
Ocean*	8,400	11,300	34.5	2.6

Continued. . .

HISPANIC POPULATION GROWTH IN NEW YORK
1980 - 1988
(CONTINUED)

State	1980 Hispanic Population	1988 Hispanic Population	1980-1988 Percent Increase	Percent Hispanic 1988
New Jersey (Cont'd)				
Passaic	62,100	77,600	25.0	16.5
Somerset	4,100	5,200	26.8	2.2
Sussex	1,800	2,300	27.8	1.5
Union	40,800	53,500	31.1	9.8
Connecticut				
Fairfield	45,100	54,300	20.4	6.1
Pennsylvania				
Pike*	100	400	300.0	1.7
TOTAL N.Y. ADI	2,063,100	2,550,800	23.6	13.1
TOTAL N.Y. METRO	2,041,100	2,522,200	23.6	13.7

* Counties excluded from Metro Area

Source: U.S. Department of Commerce,
Bureau of the Census
Strategy Research Corporation

G. DENSITY OF HISPANIC POPULATION BY COUNTY

The density of Hispanic population varies within counties of the New York ADI. The densities range from a high of 38.9% for the Bronx, to a low of 1.0% in Hunterdon. In order to give an idea of the distribution of population densities, the 28 counties were grouped into three density segments: counties where Hispanics represented 20% or more of the total population, counties with Hispanic populations between 6% and 20% and counties with less than 6% of Hispanics.

HISPANIC POPULATION DENSITY BY COUNTY FOR NEW YORK ADI (28 COUNTIES)

County	State	Hispanic Population (000's)	Percent County Hispanic	Percent Total ADI
		20% Or More Hispanic		
Bronx	NY	459.3	38.9%	
Hudson	NJ	185.5	31.0	
New York	NY	406.4	26.7	
Kings	NY	460.3	20.1	
Sub-total (Avg.)		1,511.5	(27.8%)	59.3%
		6% - 19% Hispanic		
Queens	NY	362.7	17.1	
Passaic	NJ	77.6	16.5	
Essex	NJ	93.4	10.4	
Union	NJ	53.5	9.8	
Middlesex	NJ	43.0	6.6	
Westchester	NY	64.0	6.3	
Fairfield	CT	54.3	6.1	
Richmond	NY	24.2	6.0	
Sub-total (Avg.)		772.7	(11.1%)	30.3%
		Less Than 6% Hispanic		
Suffolk	NY	73.6	5.3	
Rockland	NY	14.7	5.0	
Orange	NY	14.1	4.8	
Sullivan	NY	3.3	4.6	
Nassau	NY	56.5	4.3	
Bergen	NJ	37.4	4.1	
Ulster	NY	6.1	3.4	
Morris	NJ	14.1	3.2	
Monmouth	NJ	17.2	3.0	
Ocean	NJ	11.3	2.6	

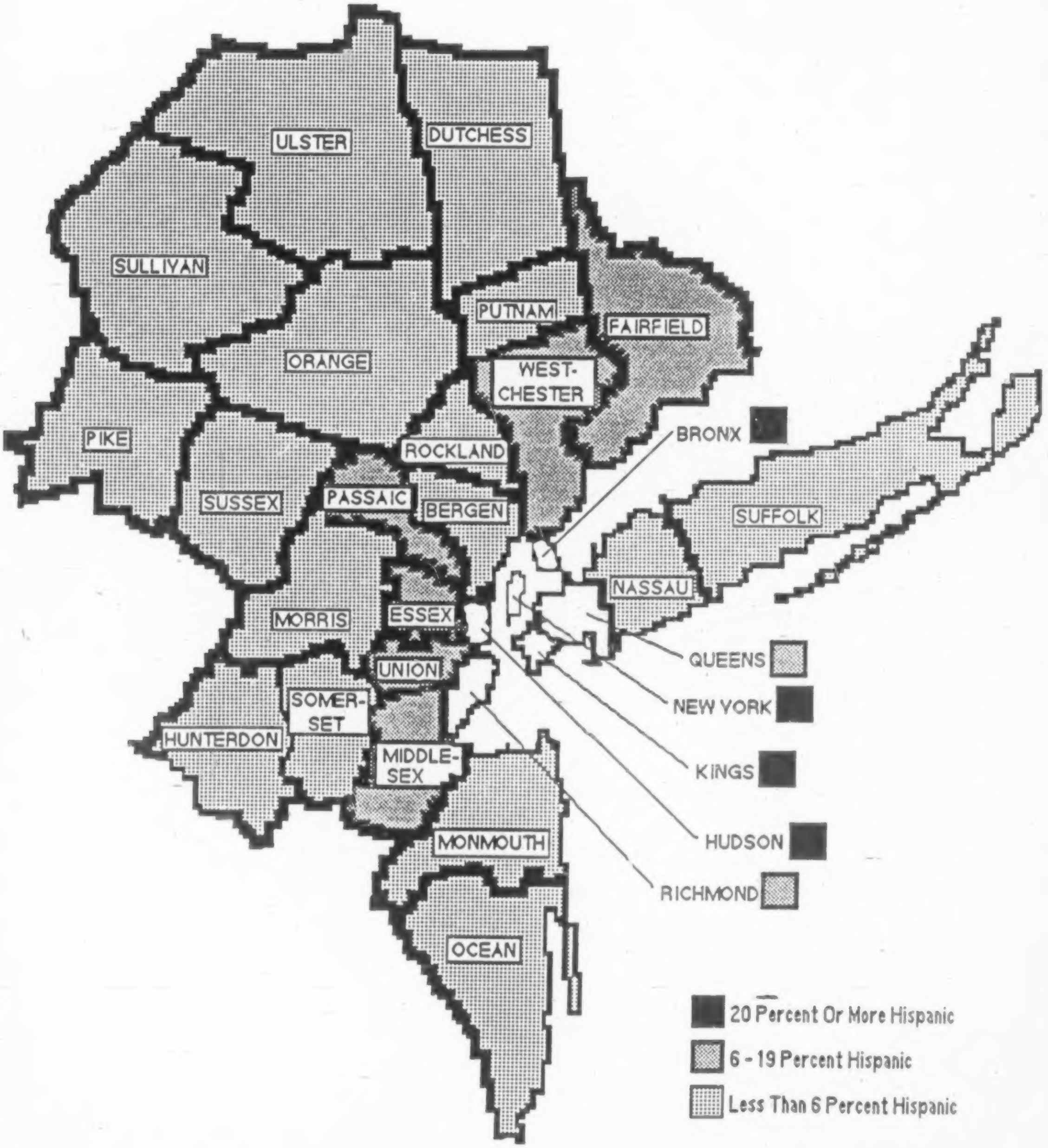
Continued. . .

HISPANIC POPULATION DENSITY BY COUNTY FOR NEW YORK ADI (28 COUNTIES)
(CONTINUED)

County	State	Hispanic Population (000)	Percent County Hispanic	Percent Total ADI
Dutchess	NY	7.5	2.5	
Somerset	NJ	5.2	2.2	
Pike	PA	0.4	1.7	
Putnam	NY	1.6	1.7	
Sussex	NJ	2.3	1.5	
Hunterdon	NJ	1.3	1.0	
Sub-Total (Avg.)		266.6	(3.9%)	10.4%
TOTAL		**2,550.8**	**13.1**	**100.0%**

For greater clarity, the information on population density presented in the table is also shown on the map. The map gives a geographic representation of the counties in the New York Metro and ADI area. The overall area has been shaded to highlight the demographic densities of the Hispanic population in the area and illustrates clearly Bronx, New York, Kings and Hudson as the areas of greatest density of the Hispanic population.

1988
NEW YORK ADI HISPANIC DENSITY MAP BY COUNTY


ULSTER
DUTCHESS
SULLIVAN
PUTNAM
FAIRFIELD
ORANGE
WEST-CHESTER
PIKE
ROCKLAND
BRONX
SUSSEX
PASSAIC
BERGEN
SUFFOLK
NASSAU
MORRIS
ESSEX
QUEENS
UNION
NEW YORK
SOMER-SET
HUNTERDON
MIDDLE-SEX
KINGS
HUDSON
MONMOUTH
RICHMOND
OCEAN
20 Percent Or More Hispanic
6 - 19 Percent Hispanic
Less Than 6 Percent Hispanic

H. SUMMARY

The Hispanic population of the New York area continues to show overall sustained growth. The New York ADI shows an increase of more than 23% in Hispanic population since 1980, to a total of more than 2.5 million persons. An important finding of this Study is that, after almost a decade of decrease, the Non-Hispanic population is again increasing.

The vigorous growth in the Hispanic population of the New York area carries significant implications:

- It produces a large and expanding market, with considerable spending power and increasing demand for consumer products.
- The prosperity of the New York Hispanic population in turn underlines the potential and the attractiveness of the New York area for other Hispanics.

For the future, we envision continued growth in immigration to the area, especially in light of the undocumented immigration reported by the City of New York. This growth is consistent with such contributory factors as the evolution of a strong cultural base in the area, the continuing instability in Central and South America and the impact of the Amnesty Law.

III. MARKET PROFILE AND CHARACTERISTICS

This section of the report presents significant characteristics of the 1988 New York Hispanic Market such as: population size in the ADI and Metro areas; country of origin; residency status; household size; age/sex distribution; employment status and occupation; educational level, household income, and finally an estimate of total Hispanic buying power.

As of January 1, 1988, there are an estimated 2,550,800 Hispanics living in the 28 counties comprising the New York ADI (Area of Dominant Influence). Hispanics make up 13.1% of the total ADI population. In the New York Metro Area, there are 2,522,200 Hispanics, and here they represent 13.7% of the total population.

A. COUNTRY OF ORIGIN OF HEAD OF HOUSEHOLD

1. Area/Country Of Origin-Hispanic Market

Puerto Ricans are currently the dominant nationality in the New York Hispanic Market with 45.1% of the Hispanic heads of household being of Puerto Rican origin or descent.

Households headed by persons from the Dominican Republic represent the second largest percentage of New York area Hispanics (27.8%), while those from South and Central America followed with 18.9% of the total.

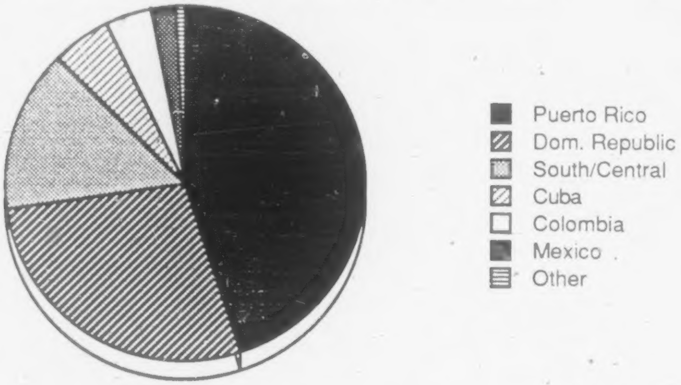
COUNTRY OF ORIGIN
HISPANIC HEAD OF HOUSEHOLD

	1988
Puerto Rico	45.1%
Dominican Republic	27.8
South/Central America (excl. Colombia)	14.7
Cuba	5.2
Colombia	4.2
Mexico	2.3
Other	0.7
TOTAL	100.0%

Source: Strategy Research Corporation

Heads of household of Cuban, Colombian and Mexican nationalities followed, with 5.2%, 4.2% and 2.3% respectively.

1988
COUNTRY OF ORIGIN OF HISPANIC HEAD OF HOUSEHOLD



Source: Strategy Research Corporation

2. Number of Households By Area of Origin-Hispanic Market

Of the total estimated number of households in the 1988 New York Hispanic Market, approximately 370,000 households are headed by a Puerto Rican.

Approximately 228,000 heads of household are of Dominican origin, while just over 155,000 households are headed by people from South and Central America, including Colombia.

NUMBER OF HOUSEHOLDS BY COUNTRY OF ORIGIN OF THE HISPANIC HEAD OF HOUSEHOLD NEW YORK/NEW JERSEY MARKET AREA

Head Of Household Country Of Origin	1988 Number Of Households
Puerto Rico	369,910
Dominican Republic	228,016
South/Central America (excl. Colombia)	120,570
Cuba	42,650
Colombia	34,448
Mexico	18,865
Other	5,741
TOTAL	820,200

Source: Strategy Research Corporation

3. Number of Persons By Area Of Origin-Hispanic Market

Of the estimated 2,550,800 Hispanics that live in the New York/New Jersey area, approximately 1,150,400 reside in households where the head of household is of Puerto Rican origin or descent.

NUMBER OF PERSONS BY COUNTRY OF ORIGIN
NEW YORK/NEW JERSEY MARKET AREA

Head Of Household Country Of Origin	1988 Number Of Persons
Puerto Rico	1,150,411
Dominican Republic	709,122
South/Central America (excl. Colombia)	374,968
Cuba	132,641
Colombia	107,134
Mexico	58,668
Other	17,856
TOTAL	2,550,800

Source: Strategy Research Corporation

It is also estimated that over 700,000 Dominicans and approximately 482,000 South and Central Americans reside in the New York/New Jersey area.

B. RESIDENCY STATUS

The number of Hispanics who have entered the United States is impressive. But this number does not measure the potential for future immigration to the U.S. from the Caribbean, South and Central America. Neither the INS nor the Justice Department provide statistics which reflect the true magnitude of this potential.

The figures in the following table present an eloquent comparison between the projected growth of the Latin American population and that of the United States and Canada.

From parity with the U.S. and Canada in 1950, the Latin American population has grown, in 1985, to one and a half times the U.S./Canadian population (405 million, versus 264 million). In the year 2005, the Latin American population could be more than twice as large as that of the U.S and Canada.

POPULATION PRESSURE IN LATIN AMERICA

	Population Latin America	Population U.S./Canada
1950	165 Million	166 Million
1985	405 Million	264 Million
2005	780 Million	345 Million

Source: Population Reference Bureau, Washington, D.C.

The underlying causes for immigration from Central and Latin America to the U.S. have been economic, social and political. These causes remain basically unchanged. The pace of future immigration is likely to reflect this process as well as the increasing population pressure.

If residency represents the end of one stage in the immigration process, it also represents the beginning of another. The immigrant takes part in a dynamic, ongoing process. He himself contributes to the process since his example and his decisions influence others. Certain measures used in this Study illustrate this process. Language is one example: specialists tell us that the first language learned is the one with which the person is most comfortable. Nevertheless, the dynamics of the immigration process determine that this large market remains essentially Spanish-speaking and, in fact, shows an increase over the past eight years as regards speaking Spanish in the home.

Large scale Hispanic immigration to the United States started after World War II. The Hispanic immigration movement had two main origins: first, after the war, a large number of Mexicans, both war veterans as well as those involved in the U.S. wartime industries, sought to settle in the United States. Second, a significant channel of entry to the U.S was opened for another Hispanic segment through "Operation Bootstrap". This was a comprehensive and imaginative program initiated for Puerto Rico in 1950. It was soon to be followed by the ratification and proclamation of commonwealth status for the island.

The overall aim of "Operation Bootstrap" was the accelerated economic development of Puerto Rico. One of the features of the program was an "air bridge" between Puerto Rico and New York. This was developed by Eleanor Roosevelt, widow of the President and a prominent humanitarian, and Muñoz Marin, then Governor of the island. The objective of the two-way air bridge was to educate and familiarize Puerto Ricans, through study, residence and working in the U.S., with resources, skills and opportunities that they could bring back and apply themselves in their island. Returning Puerto Ricans were not only ready to participate in the developing economy of their country, but also served, through their success, as examples to others.

This was the first link in organized Hispanic immigration to New York and the first stage of an ongoing process which may still be observed. The Hispanic nucleus in New York formed by the Puerto Ricans has grown and attracted other Hispanics, from other Caribean countries as well as from South and Central America. This Study shows that virtually 90% of New York area Hispanics are born in other countries.

1. Place Of Birth

New York/New Jersey heads of household, aged 18+, were asked whether they were born in the United States or some other Latin country including Puerto Rico.

Approximately nine out of ten New York/New Jersey area Hispanics were born outside the U.S. Only about ten percent of the Hispanics were born in the United States.

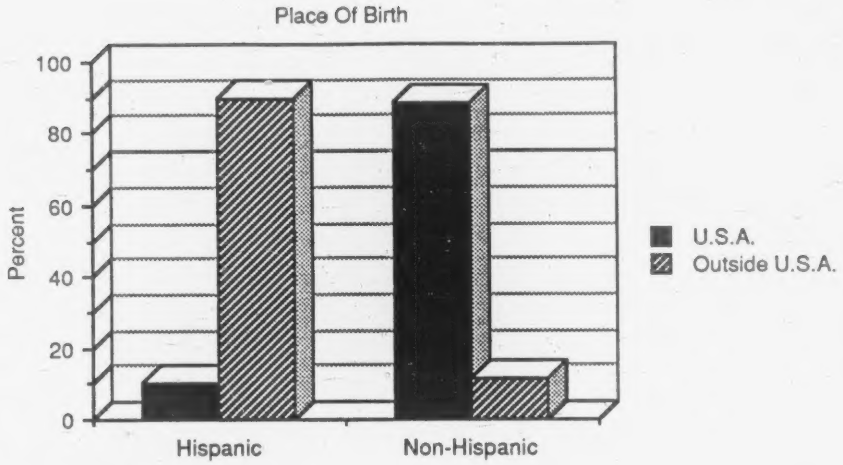
PLACE OF BIRTH
1988

	Hispanics	Non-Hispanics
Outside U.S.A	89.7%	11.3%
U.S.A	10.3	88.7
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Of the Non-Hispanic participants interviewed, 88.7% were born in the United States, while only 11.3% were born in another country.

1



Source: Strategy Research Corporation

2. Length Of Residency In The New York/New Jersey Area-Hispanic Market

Hispanic heads of household were asked to state the length of time they had been living in the New York/New Jersey Area.

A total of 16.6% of the Hispanic heads of household have been residing in the New York/New Jersey area five years or less, while 54.1% have resided in the area 11 years or more.

LENGTH OF TIME HEAD OF HOUSEHOLD HAS BEEN LIVING IN NEW YORK/NEW JERSEY

	Percent	
Less Than 1 Year	1.9%	
1 - 3 Years	4.0	16.6%
3 - 5 Years	10.7	
5 - 7 Years	11.2	
7 - 9 Years	7.0	29.3
9 - 11 Years	11.1	
11 - 15 Years	12.7	
15 - 20 Years	15.0	54.1
20 Years Or Longer	26.4	
TOTAL	100.0%	
Average Length Of Residency	15 Years	

Source: Strategy Research Corporation

The average length of residency in the New York/New Jersey area among Hispanic heads of household is approximately 15 years.

C. NUMBER OF HOUSEHOLDS

There are over 820,000 Latin households in the New York area and approximately 6,300,000 Non-Hispanic households.

Hispanic households make up an estimated 11.5% of all area households.

HOUSEHOLDS IN NEW YORK - 1988
TWENTY-EIGHT COUNTY AREA (ADI)

Ethnicity	Households	Percent
Hispanic	820,200	11.5%
Non-Hispanic	6,340,263	88.5
TOTAL	7,160,463	100.0%

A comparison of Hispanic and Non-Hispanic population and household proportions is presented in the following table.

COMPARISON OF HISPANIC POPULATIONS
AND HOUSEHOLDS IN THE NEW YORK AREA

	Population		Households	
	Size	Percent	Size	Percent
Hispanic	2,550,800	13.1%	820,200	11.5%
Non-Hispanic	16,865,100	86.9	6,340,263	88.5
TOTAL	19,415,900	100.0%	7,160,463	100.0%

D. HOUSEHOLD SIZE

1. Persons Per Household

Hispanic households tend to be larger than Non-Hispanic. A total of 38.3% of the Hispanic households in the New York Market consist of only one or two persons. In contrast, the comparable proportion for Non-Hispanics is 57.5%.

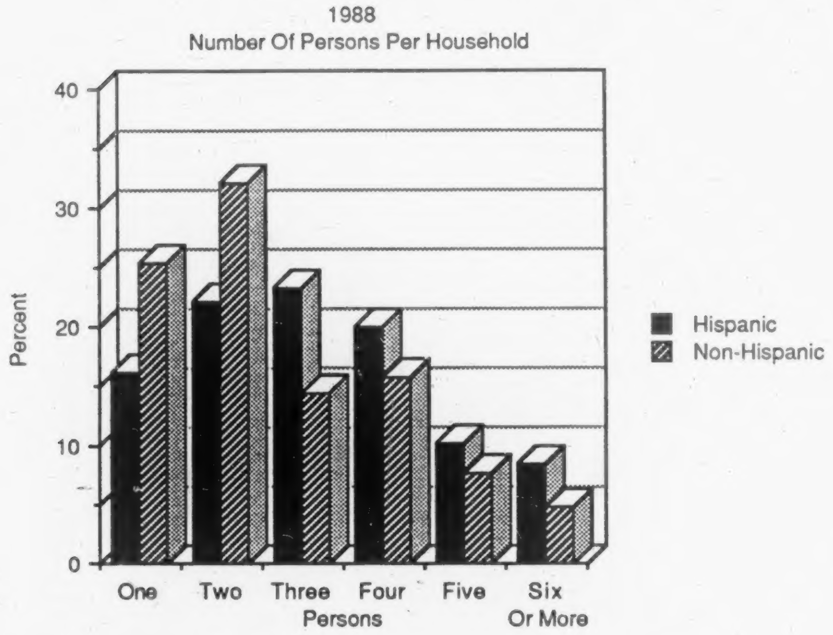
On the other hand, households comprising three or four persons make up approximately 43% of all area Hispanic households, but represent approximately 30% of the Non-Hispanic segment.

FAMILY MEMBERS LIVING WITHIN THE SAME HOUSEHOLD

	1988	
	Hispanic	Non-Hispanic
One	16.2%	25.4%
Two	22.1	32.1
Three	23.2	14.4
Four	20.0	15.7
Five	10.1	7.6
Six Or More	8.4	4.8
TOTAL	100.0%	100.0%
Average Number of Persons Per Household	3.1	2.7

Source: Strategy Research Corporation

The average number of family members living in a Hispanic household is 3.1 persons: Non-Hispanic households average 2.7 persons.



Source: Strategy Research Corporation

The graph clearly shows the "fall-off" in the distribution of larger size households among Non-Hispanics.

2. Households By Size-Hispanic Market

Among New York/New Jersey Hispanics, there are an estimated 314,136 households with one or two members, and 190,287 households with three members.

NUMBER OF HOUSEHOLDS BY SIZE

Household Size	1988 Number Of Households
One-Two	314,136
Three	190,287
Four-Five	246,880
Six Or More	68,897
TOTAL	820,200

Source: Strategy Research Corporation

Approximately 69,000 households comprise six or more persons.

E. AGE/SEX DISTRIBUTION

This is a relatively young market: approximately 36% of the New York Hispanic market are under 18 years of age, while 33.7% are between the ages of 18 and 34.

NEW YORK ADI
(28 COUNTIES)
HISPANIC AGE/SEX DISTRIBUTION
1988

	Hispanic Population (000)	Percent Distribution
Males 18 - 24	170.3	6.7%
Males 25 - 34	243.1	9.5
Males 35 - 49	196.5	7.7
Males 50 - 54	36.6	1.4
Males 55 - 64	73.2	2.9
Males 65+	33.2	1.3
Males 18+	**752.9**	**29.5%**
Females 18 - 24	183.9	7.2%
Females 25 - 34	262.5	10.3
Females 35 - 49	234.5	9.2
Females 50 - 54	44.4	1.7
Females 55 - 64	88.7	3.5
Females 65+	61.1	2.4
Females 18+	**875.1**	**34.3%**
Teens (12 - 17)	**285.9**	**11.2**
Children (0 - 11)	**636.9**	**25.0**
TOTAL	**2,550.8**	**100.0%**

Source: Strategy Research Corporation

The average age of New York/New Jersey Hispanics is 27.8 years and of Non-Hispanics, 36.8.

F. OCCUPATION OF HEAD OF HOUSEHOLD

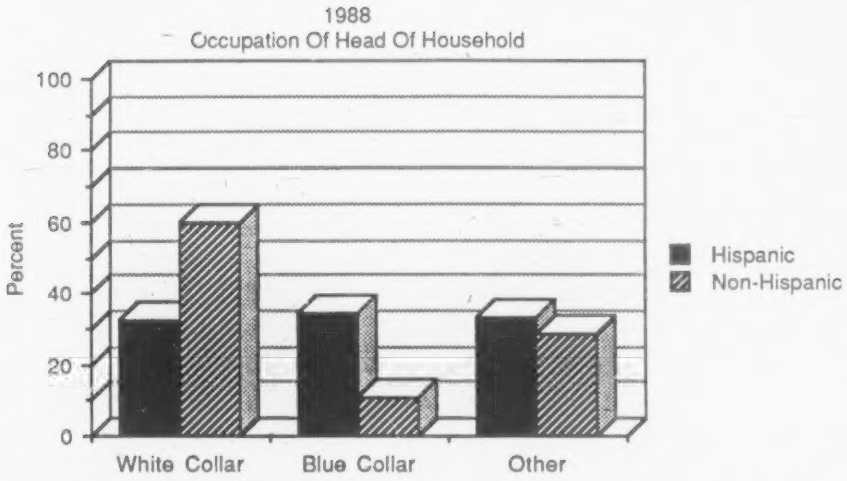
Approximately 32% of the Hispanic heads of household are employed in white collar professions, while 34.7% are employed in blue collar positions.

1988
OCCUPATION OF NEW YORK/NEW JERSEY HEAD OF HOUSEHOLD

	Hispanic	Non-Hispanic
White Collar		
Professional, Manager, Owner, Technical, Clerical, Sales	32.4%	60.1%
Blue Collar		
Craftsmen, Operatives, Service Workers, Laborers, Farmers	34.7	11.1
Other		
Retired/Students/Military/ Disabled/Unemployed	32.9	28.8
	100.0%	100.0%

Source: Strategy Research Corporation

A total of 60.1% of the Non-Hispanic heads of household are employed in white collar professions and 11.1% have blue collar jobs.



Source: Strategy Research Corporation

The generally level distribution of Hispanics in the white collar, blue collar and other occupational categories is apparent in the above diagram.

G. FULL-TIME EMPLOYMENT

1. Number Of Household Members Employed

Presently 34.8% of Hispanic households have one member employed on a full-time basis, while 31.0% have two members who are employed full-time. Nearly nine percent (8.9%) of the Hispanic households have three or more family members who work full-time.

In comparison, 43.6% of the Non-Hispanic households have only one member employed full-time, while 25.9% of the households have two family members who work full time.

EMPLOYED FULL-TIME
IN NEW YORK/NEW JERSEY HOUSEHOLDS

	1988	
	Hispanic	Non-Hispanic
One	34.8%	43.6%
Two	31.0	25.9
Three	5.4	5.9
Four Or More	3.5	4.4
None	25.3	20.2
TOTAL	100.0%	100.0%
Average Number Employed Full Time	1.3	1.3

Source: Strategy Research Corporation

Currently, the average number of persons employed full-time for both Hispanic and Non-Hispanic households is approximately 1.3 persons.

2. Female Full-Time Employment

Slightly more Non-Hispanic than Hispanic households have at least one female employed full-time (51.5% versus 49.9%, respectively).

NUMBER OF FEMALES IN HOUSEHOLD EMPLOYED FULL-TIME

	1988	
	Hispanic	Non-Hispanic
One	43.4%	42.0%
Two	5.5	8.7
Three	1.0	0.1
Four Or More	0.0	0.7
None	50.1	48.5
TOTAL	100.0%	100.0%
Average Number Employed Full Time	0.6	0.6

Source: Strategy Research Corporation

The following section presents and compares education levels.

H. LEVEL OF EDUCATION OF HEAD OF HOUSEHOLD

All heads of household were asked about the last level of school completed.

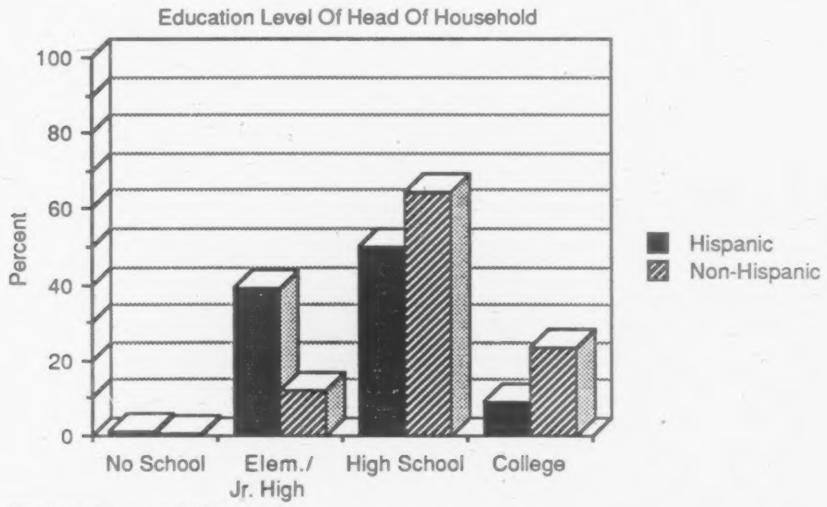
Over one third of Hispanic heads of household reached elementary or junior high school, and approximately half, high school or bachillerato[1].

LEVEL OF EDUCATION OF HEAD OF HOUSEHOLD

	1988	
	Hispanic	Non-Hispanic
No Schooling	1.5%	0.4%
Elementary/Junior High School	39.1	11.9
High School/ Bachillerato	50.1	64.4
College	9.3	23.3
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

As regards college education, approximately 9% of Hispanics had completed college, compared with about 23% of Non-Hispanics.



Source: Strategy Research Corporation

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[1] A bachillerato differs from traditional domestic education in that it is a 5-year program.

I. HOUSEHOLD INCOME

The average annual household income in 1988 among New York Hispanics is $26,121; the average annual income per Non-Hispanic household is $39,662.

HOUSEHOLD INCOME
1988

	Hispanic	Non-Hispanic
Mean Average Annual Income	$26,121	$39,662

Source: Strategy Research Corporation

J. HISPANIC BUYING POWER

In the New York/New Jersey Market, there are an estimated 820,200 households headed by Hispanics; taking as a basis the mean average annual household income, the aggregate gross income is approximately $21 billion. The net income (reflecting buying power) is approximately $18.9 billion. This figure was adjusted to be comparable with Market Statistics Survey Of Buying Power.

1988
HISPANIC BUYING POWER

New York ADI	$18.9 billion

Source: Strategy Research Corporation

This figure represents impressive buying power and is approximately equal to the 1987 GNP for Chile.

With the continuing influx of Hispanics into the New York area - whatever their nationality or origin - the buying power of Hispanics as a group will increase. In addition, this Report reveals that the area Hispanics are, by and large, young people. Per capita earnings will thus tend to increase on a year-to-year basis, further reinforcing the buying power of the Hispanic community.

IV. LANGUAGE PATTERNS AND SOCIAL ATTITUDES

Language represents a key factor in the acculturation and adaptation of arrivals to a new country. It is also inextricably woven into the culture and traditions of the immigrant.

A. LANGUAGE SPOKEN AT HOME, WORK AND ON SOCIAL OCCASIONS

In order to provide meaningful insight into the patterns of language use, Hispanics were asked which language they speak most frequently at home, at work, and on social occasions.

To see if the New York/New Jersey market is responsive toward the need for language skills, Hispanic and Non-Hispanics were also asked the degree of importance they placed on their children's ability to read and write Spanish and English fluently.

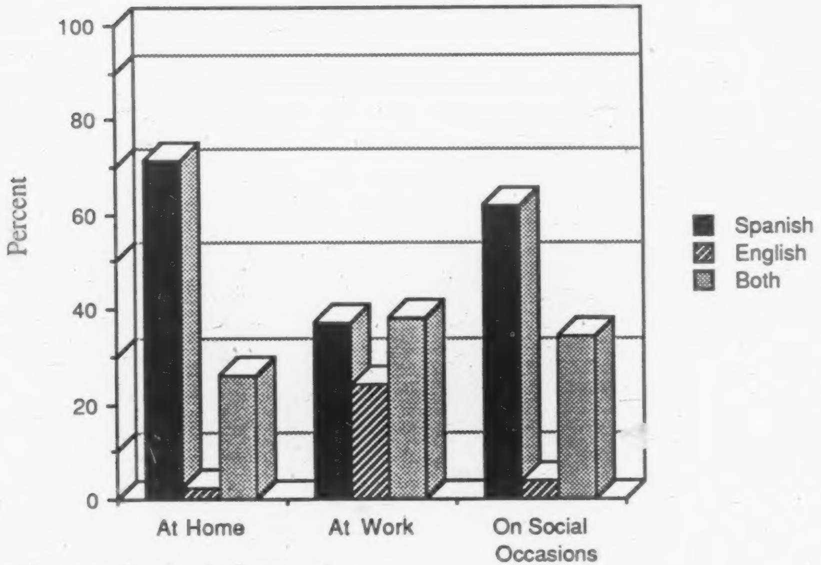
1988
LANGUAGE SPOKEN MOST FREQUENTLY
BY NEW YORK/NEW JERSEY HISPANIC
AT VARIOUS TIMES

Language Spoken	At Home	At Work	At Social Functions
Spanish	71.4%	37.4%	62.0%
English	2.6	24.3	3.9
Both	26.0	38.3	34.1
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Spanish is spoken most frequently in the home environment. The use of Spanish among New York Hispanics in the home has grown from 58.8% in 1980 to 71.4% currently. Approximately two thirds of area Hispanics speak Spanish on social occasions. In the work environment, it is more usual for Hispanics to speak both English and Spanish (38.3%), rather than either Spanish alone (37.4%), or English (24.3%).

1988
Language Spoken Most Frequently
At Various Times



Source: Strategy Research Corporation

The preceeding table is a summary of the language spoken most frequently by New York/New Jersey Hispanics at various times.

B. ATTITUDES REGARDING LANGUAGE

In order to see if the New York/New Jersey Market is responsive toward the need for language skills, both Hispanic and Non-Hispanic respondents were asked the following two questions:

1. "How important is it to you that your children have the ability to read and write Spanish perfectly?"
2. "How important is it to you that your children have the ability to read and write English perfectly?"

The possible answers were:

- Very Important
- Somewhat Important
- Neither Important Nor Unimportant
- Not Very Important
- Not At All Important

1. Spanish

A total of 96.7% of the Hispanics participating in the study feel that it is "very/somewhat important" for their children to read and write Spanish perfectly.

1988
IMPORTANCE OF CHILDREN
READING AND WRITING
SPANISH PERFECTLY

	Hispanic	Non-Hispanic
Very Important	93.8%	12.7%
Somewhat Important	2.9	17.0
Neither Important Nor Unimportant	0.8	22.2
Not Very Important	0.9	9.2
Not Important At All	1.6	38.9
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Among the Non-Hispanics, 29.7% of those interviewed deem it "very/somewhat important" for their children to read and write Spanish perfectly.

2. English

Both Hispanics and Non-Hispanics placed almost the same importance on their children mastering English language skills. A total of 96.7% of Hispanic respondents stated that it was "very/somewhat important" that their children master the English language, while 95.9% of the Non-Hispanics also felt the same way.

1988
IMPORTANCE OF CHILDREN READING AND WRITING ENGLISH PERFECTLY

	Hispanic	Non-Hispanic
Very Important	95.9%	95.1%
Somewhat Important	0.8	0.8
Neither Important Nor Unimportant	0.6	1.0
Not Very Important	0.7	0.0
Not Important At All	2.0	3.1
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

The following section will compare social attitudes among Hispanics and Non-Hispanics.

C. SOCIAL ATTITUDES

In the course of Hispanic Market Studies over a number of years, Strategy Research Corporation has been able to build up and to validate a battery of scaled statements which provide a reliable measure of the attitudes of Hispanics to aspects of their culture.

Respondents -- Hispanic as well as Non-Hispanic -- are presented with a series of affirmations. They are asked to state the extent of their agreement with each affirmation, using a 5-point rating scale. The points on the scale are:

- Completely Agree
- Somewhat Agree
- Neither Agree Nor Disagree
- Somewhat Disagree
- Completely Disagree

Because respondents sometimes avoid use of the extremes of the scale in giving their opinions, we have shown the results of the scaled opinions by presenting both the "Completely Agree" ratings (Top Box) as well as the combined "Completely Agree/Somewhat Agree" (Top Two Boxes). Percentages mentioned in the text refer to the combined "Completely Agree/Somewhat Agree" ratings.

New York Hispanics, though of diverse origins, nonetheless present an impressive uniformity on certain attributes of their heritage. Of the ten affirmations presented, five received measures of high agreement of over 90%. These affirmations covered a wide range of culturally-related aspects. The most popular of these dealt with Hispanic culture and traditions. To an exceptional degree, Hispanic respondents agreed emphatically with the affirmation: "I Am Proud To Be Latin And I Think Our Culture/Traditions Should Be Preserved And Kept".

There was an almost equally striking degree of identification among Hispanic respondents with the statement concerning family bonds: "It's Important To Get Together With Family Frequently On Social Occasions", although family get-togethers are only slightly less important to Non-Hispanics. This statement met with complete or almost total agreement from 98.8% of the Hispanics interviewed and from 93.8% of the Non-Hispanics.

A third statement which emerged as a characteristic Hispanic trait was that expressed in the statement, "I Like To Listen To Latin Music", endorsed by 98.0% of the Hispanic sample. (This attribute invites comparison with a related and also highly popular statement, "I Enjoy Dancing To Latin Rhythm", also with a high degree of agreement, nearly 92.0%).

Another attribute referred to shopping and presented the statement:."It Is Very Important For Me To Shop At A Store Where I Feel Welcome". This received the same measure of approval (98.0%) as the statement referring to Latin Music and emphasizes that for Hispanics, shopping is more than a simple and impersonal transaction.

CULTURAL ATTITUDES AND BELIEFS
"COMPLETELY AGREE"/TOP BOX ONLY IN BOLD
"COMPLETELY/SOMEWHAT AGREE"/TOP TWO BOXES

	1988	
	Hispanic	Non-Hispanic
I Am Proud To Be Latin And I Think Our Culture/Traditions Should Be Preserved	**96.1%** 99.5	N/A[1]
It's Important To Get Together With Family Frequently On Social Occasions	**90.2** 98.8	**79.8** 93.8
I Like To Listen To Latin Music	**90.8** 98.0	**18.2** 42.7
Very Important To Shop At A Store Where I Feel Welcome	**89.7** 98.0	**68.6** 91.3
I Enjoy Dancing To Latin Rhythm	**80.3** 91.9	**21.1** 39.7
I Like To Listen To American Music	**62.2** 84.4	**74.1** 94.0
When I Go To A Store I Prefer The Salesperson To Understand Me In Spanish	**65.8** 81.6	N/A
I Prefer To Live In A Latin Neighborhood	**53.7** 72.8	N/A
Nationally Advertised And Popular Name Brands Are The Best Products For My Family	**46.8** 71.7	**20.0** 61.2
The Popular Name Brands I Use Today Are The Same Brands I Will Be Using Next Year	**38.1** 71.0	**25.7** 61.9

[1] "N/A" indicates statements applicable only to Hispanic respondents

Source: Strategy Research Corporation

Although Hispanics overwhelmingly expressed their love of Latin music, over 80% also agreed, completely or partly, with the affirmation: "I Like To Listen To American Music".

A second aspect of shopping considered important by Hispanics (in addition to the need for shopping at stores where they felt welcome) was that of being attended by Spanish speaking salespeople. More than 80% agreed with the affirmation concerning this preference. Hispanics typically feel more comfortable when they can establish a personal relationship, even when making a purchase.

Nearly three out of four Hispanics would prefer to live in a Latin neighborhood.

The remaining two affirmations refer to a preference for name brand merchandise. Over 70% of Hispanics concur in the preference for popular, nationally advertised brands for themselves and their families.

These findings have relevance in two areas. First, they show that Hispanics in the New York area clearly manifest and reaffirm their identity as a Hispanic comunity. In a new environment, they are, in a real sense, more Latin than before, more conscious of their heritage and intensely proud of their culture.

The second area concerns one of the most interesting aspects of acculturation. This can be seen in the process whereby, with time and the influence of their new environment, these Hispanics develop a bi-cultural personality. On the one hand, they are emotionally linked to their countries of origin, and, even when geographically distant, remain sensitive to factors such as language and music. On the other, they acquire a new language, new concepts, tastes and different modes of behavior in their new environment.

Immigration today is a different process compared with what it was fifty years ago. An important difference now is that the bond of the immigrant to his country is no longer always severed when he leaves. The effect is a greater continuity of cultural and traditional links. Cubans cannot return to their homeland. Some other nationalities, if they re-visit their countries, cannot easily return to the U.S. However, for the majority of Hispanics in this country, air travel and telecommunications make the immigrant's homeland and family increasingly accessible. In this respect, Hispanics in the New York area are in a favored position over those in other parts of the United States, in terms of higher income level and easy, convenient access to air travel.

V. SHOPPING PATTERNS

The analysis and comparison of shopping patterns is made on the basis of data from types of grocery stores shopped in the past month and on weekly expenditure on food in different types of outlets. We have also included purchases from other types of stores and looked at the number of people who usually accompany respondents when they are shopping for clothing.

A. FOOD STORE PATRONAGE

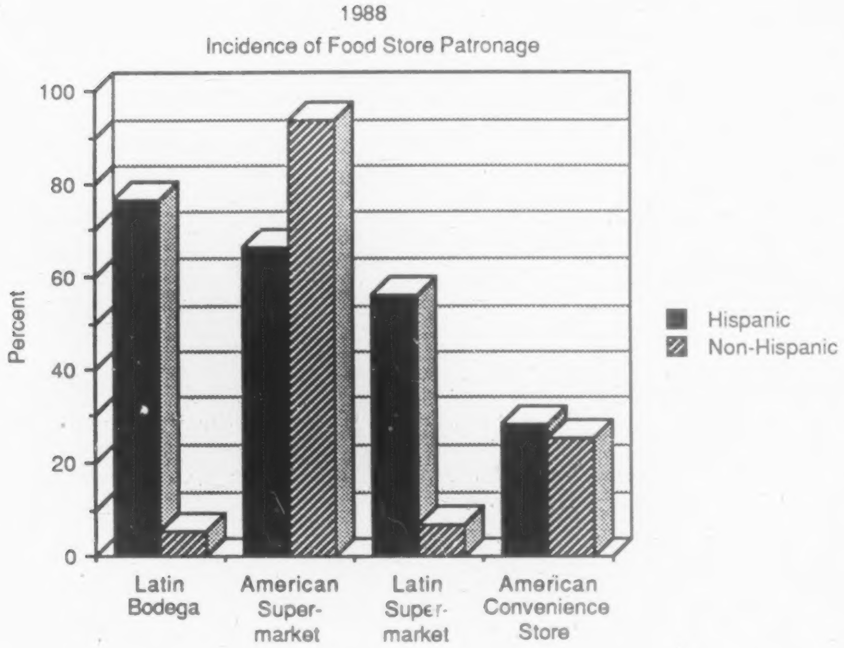
1. Types Of Stores Patronized

Respondents were first asked where they had purchased groceries in the past month. In this respect, New York area Hispanics present a characteristic pattern, spreading their grocery purchases over four major types of grocery outlets: more than three-quarters of them mentioned Latin *bodegas* (smaller, neighborhood stores), two-thirds named American chain supermarkets, and over one-half had purchased groceries at Latin supermarkets. More than 1 in 4 Hispanics also shop at American convenience stores.

TYPES OF FOOD STORES PATRONIZED IN PAST MONTH

	1988	
	Hispanic	Non-Hispanic
Small Latin Bodega	76.7%	5.5%
American Chain Supermarket	66.2	93.9
Latin Supermarket	55.9	6.7
American Convenience Store	28.4	25.3

Source: Strategy Research Corporation



Source: Strategy Research Corporation

Non-Hispanics show a different pattern of grocery shopping: for more than 90% the primary grocery store is the American chain supermarket. Approximately 25% purchase groceries at a convenience store. Relatively few (between 5% and 7%) frequent Latin *bodegas* or Latin supermarkets.

2. Weekly Food Store Expenditures Among Hispanics

Weekly food store expenditure was obtained separately for supermarkets/grocery stores and for Hispanic *bodegas*.

The average weekly expenditure for Hispanic households at supermarkets and grocery stores is $80.46.

AVERAGE WEEKLY EXPENDITURE AT FOOD OUTLETS AMONG HISPANICS

	1988
	Hispanic
Supermarkets And Grocery Stores	$80.46
Hispanic Bodegas	$19.37
TOTAL	$99.83

Source: Strategy Research Corporation

Weekly expenditure at Hispanic *bodegas* averages approximately $19 per household, equivalent to approximately 19% of total food store expenditure.

Total weekly food store expenditure for Hispanics averages $99.83.

3. Weekly Food Expenditures Among Hispanics And Non-Hispanics

Weekly expenditures at food outlets were compared for Hispanics and Non-Hispanics.

AVERAGE WEEKLY FOOD EXPENDITURES AMONG HISPANICS AND NON-HISPANICS

Hispanics	$99.83
Non-Hispanics	$98.13

Source: Strategy Research Corporation

In comparing these food costs, it is important to remember that the total food expenditure shown for Hispanics excludes, largely or completely, the cost of fresh meat. Hispanics typically prefer meat to be cut differently and are accustomed to buy it at Latin butcher shops (*carnicerías*).

4. Total Annual Food Store Expenditures Among All Hispanics

The amount spent annually on food by all Hispanics in the New York ADI was computed by multiplying food expenditure per household by the total number of households and converting this to an annual figure.

Food expenditure among area Hispanics in supermarkets and grocery stores totals $3.4 billion annually, and in *bodegas*, $630.0 million.

TOTAL ANNUAL FOOD STORE EXPENDITURES AMONG HISPANICS

	1988
	Hispanic
Supermarkets And Grocery Stores	$3.40 billion
Hispanic Bodegas	$0.63 billion
TOTAL ANNUAL FOOD STORE EXPENDITURE	$4.03 billion

Source: Strategy Research Corporation

Total annual food store expenditure among Hispanics, excluding expenditure in Hispanic butcher shops, is estimated at more than $4 billion.

B. PATRONAGE OF OTHER TYPES OF STORES

1. Incidence Of Purchase At Discount, Department, Drug and Sporting Goods Stores

We asked all respondents if they had made any purchases at discount, department, drug, or sporting goods stores in the past month.

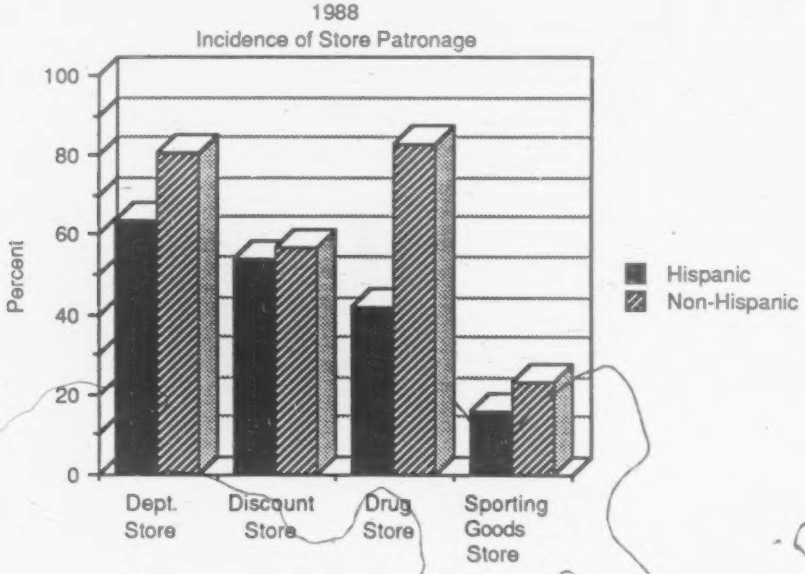
Hispanics mentioned department stores as the type of store most frequently patronized (63.6%). Of the four types of stores, drugstores were the outlets most often visited by Non-Hispanics (82.7%).

INCIDENCE OF STORE
PATRONAGE
IN THE PAST MONTH

	1988	
	Hispanic	Non-Hispanic
Department Store	63.6%	80.8%
Discount Store	54.1	56.6
Drug Store	42.3	82.7
Sporting Goods Store	16.1	23.3

Source: Strategy Research Corporation

Non-Hispanics patronized three of the four types of stores -- department, drug and sporting goods stores -- more frequently than Hispanics.



Strategy Research Corporation

2. Clothes Shopping

All survey respondents were asked: "When you go shopping for clothing, how many people generally go with you?"

Non-Hispanics are more likely than Hispanics to do their clothes shopping by themselves. Almost twice as many Non-Hispanics as Hispanics (46.5% versus 26.2%) shop for clothes unaccompanied.

CLOTHES SHOPPING
ACCOMPANIMENT OF OTHER PERSONS

	1988	
	Hispanic	Non-Hispanic
No One Else	26.2%	46.5%
One	33.2	35.8
Two	27.0	12.8
Three	10.5	2.6
Four Or More	3.1	2.3
TOTAL	100.0%	100.0%
Average Number Of People Including Respondent	2.3	1.8
Average Number Of People Excluding Respondent	1.3	0.8

Source: Strategy Research Corporation

The average number of people shopping was analyzed in two ways: first, by *including* the respondent as a shopper and second, by counting only those accompanying the respondent.

When the respondent was included, the average number of people shopping for clothes was 2.3 for Hispanics and 1.8 for Non-Hispanics. If the respondent was excluded, the average number of accompanying persons was 1.3 for Hispanics and 0.8 for Non-Hispanics.

VI. PATRONAGE OF FAST FOOD RESTAURANTS

New York Hispanics and Non-Hispanics were asked about the incidence and frequency of visiting fast food restaurants either to eat or to buy food food to take out. Respondents were questioned about hamburger, chicken, and pizza restaurants.

1. Frequency of Visiting Fast Food Hamburger Restaurants

On average, New York area Hispanics visit fast food hamburger restaurants, either for eating at or taking out, more often than Non-Hispanics: 2.3 times a month versus 1.9 times a month for Non-Hispanics.

FREQUENCY OF EATING AT OR TAKING OUT FROM FAST FOOD HAMBURGER RESTAURANT

	1988	
	Hispanic	Non-Hispanic
More Than Once A Week	12.8%	10.8%
Once A Week	21.7	17.1
3 Times A Month	10.2	4.7
Twice A Month	10.6	12.5
Once A Month	13.9	13.3
Less Than Once A Month	9.3	11.3
Never	21.5	30.3
TOTAL	100.0%	100.0%
Average Number of Times Per Month	2.3	1.9

Source: Strategy Research Corporation

Fast food hamburger restaurants are patronized weekly or more often by 34.5% of Hispanics and by 27.9% of Non-Hispanics. Slightly over 20.0% of Hispanics and more than 30.0% of Non-Hispanics never visit fast food hamburger restaurants.

2. Frequency of Visiting Fast Food Chicken Restaurants

In an average month, New York area Hispanics visit fast food chicken restaurants, either for eating or taking food out, almost twice as often as Non-Hispanics (2.0 times a month versus 1.1 times, respectively).

FREQUENCY OF EATING AT OR TAKING OUT
FROM FAST FOOD CHICKEN RESTAURANT

	1988	
	Hispanic	Non-Hispanic
More Than Once A Week	9.3%	4.9%
Once A Week	15.9	7.9
3 Times A Month	9.1	4.6
Twice A Month	12.6	7.7
Once A Month	20.3	15.9
Less Than Once A Month	11.7	12.1
Never	21.1	46.9
TOTAL	100.0%	100.0%
Average Number of Times Per Month	2.0	1.1

Source: Strategy Research Corporation

A total of 25.2% New York area Hispanics patronize fast food chicken restaurants once a week or more often, while the comparable figure for Non-Hispanics is 12.8%, or almost half as often.

3. Frequency of Visiting Fast Food Pizza Restaurants

On average, New York area Hispanics patronize fast food pizza restaurants more often than Non-Hispanics (2.9 versus 1.7 times a month, respectively).

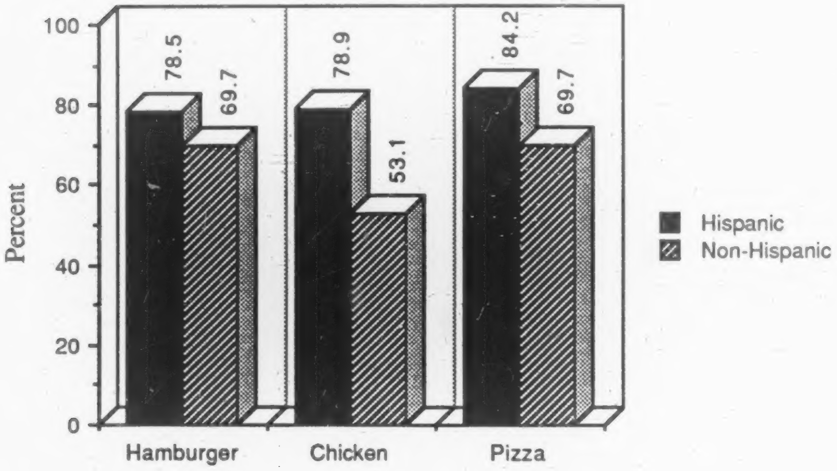
FREQUENCY OF EATING AT OR TAKING OUT
FROM FAST FOOD PIZZA RESTAURANT

	1988	
	Hispanic	Non-Hispanic
More Than Once A Week	20.6%	5.6%
Once A Week	24.3	18.5
3 Times A Month	11.5	6.5
Twice A Month	8.4	12.4
Once A Month	11.7	17.5
Less Than Once A Month	7.7	9.2
Never	15.8	30.3
TOTAL	100.0%	100.0%
Average Number of Times Per Month	2.9	1.7

Source: Strategy Research Corporation

Fast food pizza restaurants are patronized weekly or more often by 44.9% of Hispanics, while the comparable figure for Non-Hispanics is 24.1%. Nearly 16% of Hispanics and more than 30% of Non-Hispanics do not patronize fast food pizza restaurants.

1988
Incidence of Fast Food Restaurant Patronage



Source: Strategy Research Corporation

The relatively high frequency of patronage of fast food restaurants, together with high expenditure on food shopping, cannot be attributed solely to larger family size among Hispanics. It is also due to the fact that Hispanics show a definite inclination to buy fast foods.

VII. PRODUCT USAGE

All Survey respondents were asked about their purchases of food products (including frozen foods, cookies and candies), soft drinks, wines and wine coolers. They were also questioned about the extent of usership of cosmetics and personal care products. In this section of the Study, these purchases are presented and compared for Hispanics and Non-Hispanics.

A. FROZEN FOODS

In order to analyze purchases and consumption in this field, we looked at the extent of use of eight types of frozen foods, including frozen pizzas, desserts and frozen chicken. We compared the incidence of these products in Hispanic and Non-Hispanic households.

The following table shows and compares the incidence of consumption among Hispanics and Non-Hispanics of these frozen food products. In order to facilitate the comparison between Hispanic and Non-Hispanic households, a Usage Index is provided. An Index of 100 indicates that Hispanic percent incidence and Non-Hispanic incidence are identical. An index above 100 indicates that incidence among Hispanic households is higher than in Non-Hispanic households.

As an example, on the first line, in the third column, the Index for frozen pizza stands at 59. This indicates that Hispanic households have an index of consumption of frozen pizza approximately 40% below that of Non-Hispanic households.

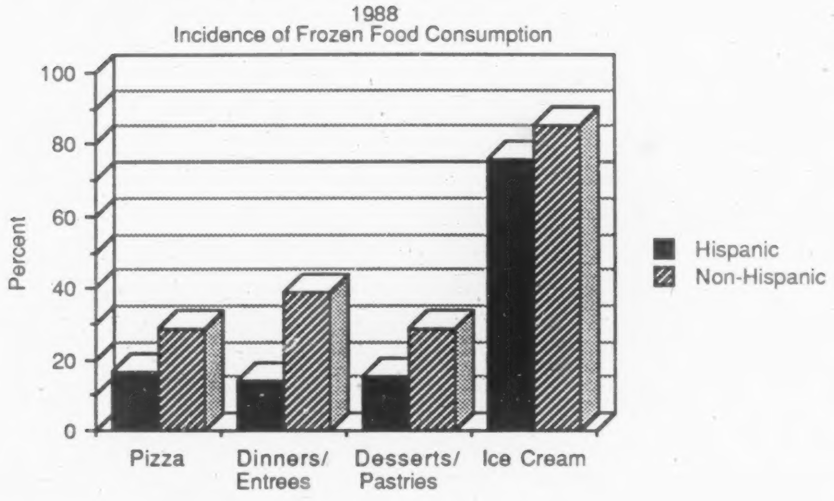
INCIDENCE OF CONSUMPTION
FROZEN FOODS

	1988		
	Hispanic	Non-Hispanic	Hispanic To Non-Hispanic Index
Frozen Pizza	16.8%	28.6%	59
Frozen Dinners or Entrees	14.3	38.6	37
Frozen Desserts or Pastries	15.2	28.4	54
Ice Cream	75.9	85.5	89
Frozen Waffles, Pancakes, or French Toast	30.0	34.3	87
Frozen Chicken	21.9	23.6	93
Frozen Potato Products	25.7	35.2	73
Frozen Fruit Pops	33.9	27.4	124

Source: Strategy Research Corporation

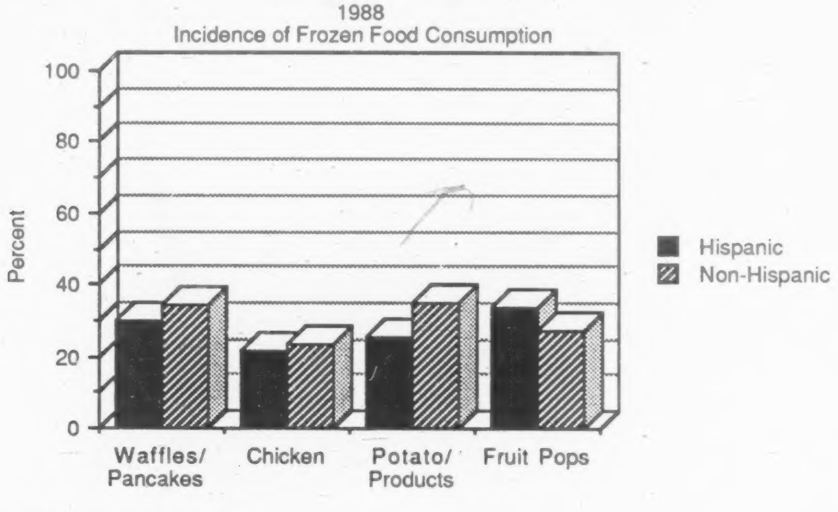
These statistics show that the levels of consumption of frozen chicken are similar (although fairly low in relation to other frozen products), for Hispanics and Non-Hispanics.

Consumption in Hispanic households of frozen fruit pops, at 33.9%, is about 25% higher than in Non-Hispanic households.



Source: Strategy Research Corporation

For the remainder of products in the frozen food category, consumption in Hispanic households is below that of Non-Hispanic households: the biggest difference can be seen in consumption of frozen dinners (nearly two thirds lower than in Non-Hispanic households). Frozen desserts are consumed about half as often in Hispanic as in Non-Hispanic households. Frozen pizza, potato products, waffles and ice cream are all consumed at a level somewhat below that of Non-Hispanic households.



Source: Strategy Research Corporation

B. COOKIES AND CANDY PRODUCTS

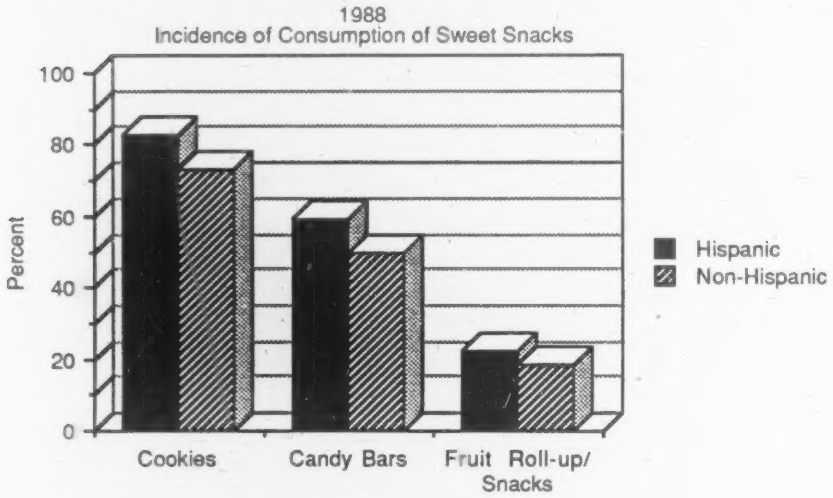
Consumption of cookies and sweets in Hispanic households is consistently higher than in Non-Hispanic households.

The Survey examined consumption of cookies, candy bars, fruit roll-ups, and snacks. In all three categories, Hispanics tend to consume, on average, about 15% more than Non-Hispanics.

INCIDENCE OF CONSUMPTION OF COOKIES AND CANDY

	1988		Hispanic to Non-Hispanic
	Hispanic	Non-Hispanic	Index
Cookies	82.5%	73.3%	113
Candy Bars	59.2	49.8	119
Fruit Roll-Ups and Snacks	22.0	18.2	121

Source: Strategy Research Corporation



Source: Strategy Research Corporation

C. SOFT DRINKS

Hispanic households show a higher consumption of regular (non-diet) soft drinks than Non-Hispanic households.

Approximately 89% of Hispanic households consume regular soft drinks, in comparison with about 78% among Non-Hispanics.

INCIDENCE OF CONSUMPTION
OF REGULAR AND DIET SOFT DRINKS

	1988		Hispanic to Non-Hispanic Index
	Hispanic	Non-Hispanic	
Regular Soft Drinks (Non-Diet)	88.9%	77.6%	115
Diet Soft Drinks	30.9	50.9	61

Source: Strategy Research Corporation

However, consumption of diet soft drinks is about 40% lower among Hispanic households. Less than one-third of Hispanic households consume this type of soft drink.

D. WINE AND WINE COOLERS

The Survey examined the comparative consumption of wine and wine coolers among Hispanic and Non-Hispanic adults.

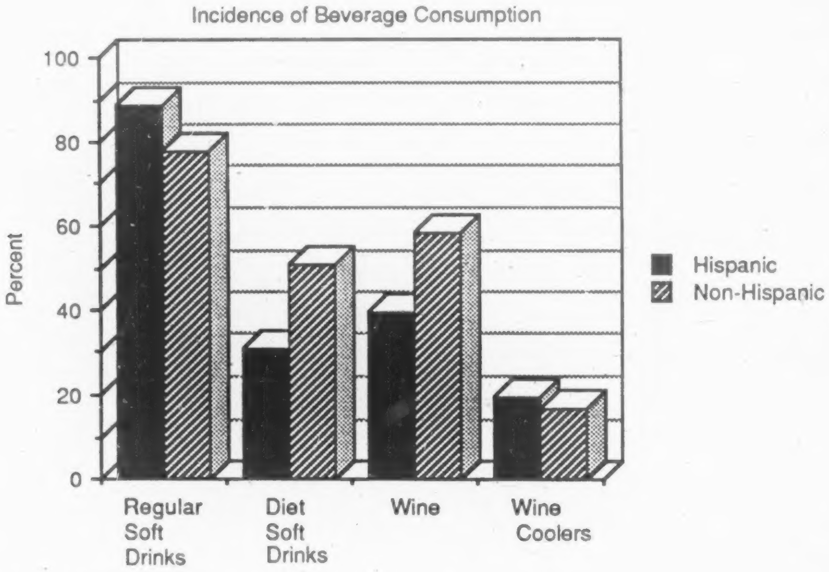
Fewer Hispanics than Non-Hispanics consume wine. Nearly 60% of Non-Hispanics consume wine and this proportion is approximately 40% above the corresponding level for Hispanics.

INCIDENCE OF CONSUMPTION OF WINE AND WINE COOLERS

	1988		Hispanic To
	Hispanic	Non-Hispanic	Non-Hispanic Index
Wine	39.2%	58.5%	67
Wine Coolers	19.4	16.6	117

Source: Strategy Research Corporation

Wine coolers are less widely consumed and show a somewhat lower level of consumption among Non-Hispanics (16.6%) than among Hispanics (19.4%).



Source: Strategy Research Corporation

E. COSMETICS AND PERSONAL CARE PRODUCTS

The Survey studied the use of cosmetics and personal care products among both men and women.

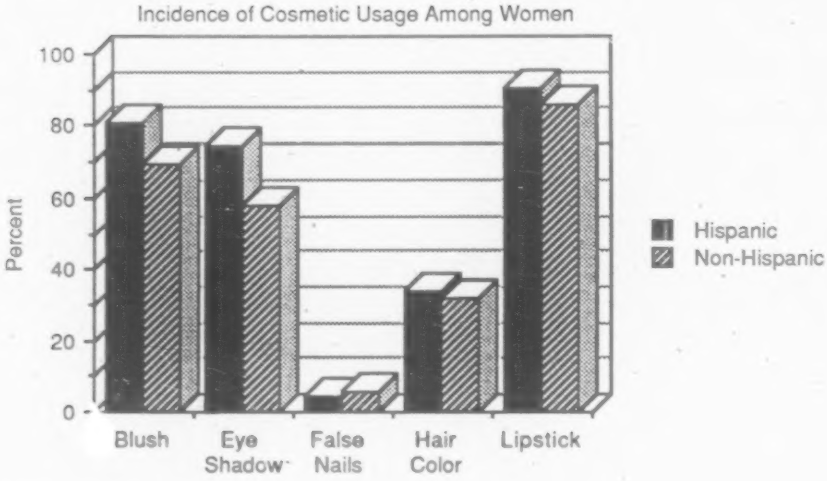
1. Usage Of Cosmetics Among Women

Looking first at the frequency of usership of cosmetics, the following table shows that lipstick, perfume/toilet water, nail polish, and blush are the four products most often used by both Hispanics as well as Non-Hispanics. Among Hispanics, all four products show a usage of between 80% and 90% approximately.

INCIDENCE OF COSMETICS USAGE AMONG WOMEN

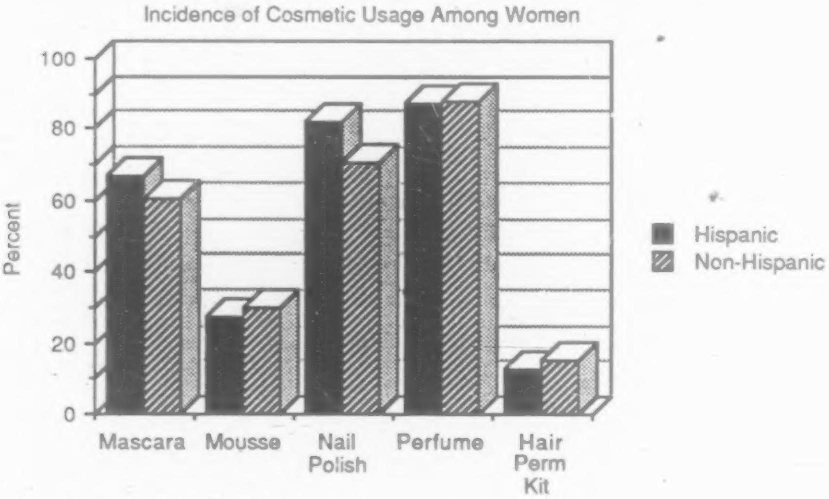
	1988		
	Hispanic	Non-Hispanic	Hispanic To Non-Hispanic Index
Lipstick	90.3%	85.8%	105
Perfume/Toilet Water	87.4	88.0	99
Nail Polish	82.2	70.7	116
Blush	80.9	69.3	117
Eye Shadow	74.3	58.0	128
Mascara	66.7	60.2	111
Hair Color	33.8	32.0	106
Mousse	27.2	29.9	91
Home Permanent Kit	12.6	15.2	83
False Nails	4.2	5.6	75

Source: Strategy Research Corporation



Source: Strategy Research Corporation

A comparison of cosmetics usage among Hispanics and Non-Hispanics shows that lipstick and perfume/toilet water are used to a comparable extent; eye shadow, nail polish and blush are used more often by Hispanics.



Source: Strategy Research Corporation

2. Usage Of Personal Care Products Among Men

The Survey examined the use of personal care products by men: the products included shaving cream, after shave lotions and electric shavers.

Latin males are more frequent users of personal care products than Non-Hispanics.

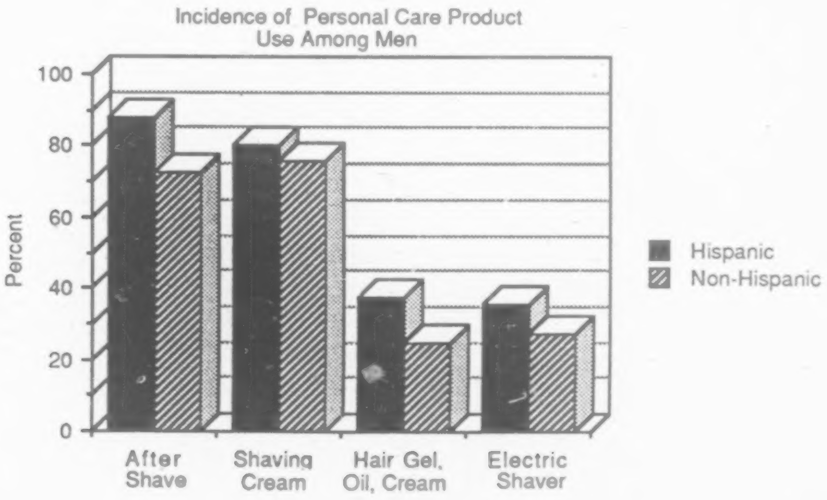
After shave lotions and shaving creams are the two products with the highest frequency of use among men. After shave lotions are used more by Hispanics (87.7%), than by Non-Hispanics (72.4%). Turning to shaving creams, these are also used by a somewhat higher proportion of Hispanics (80.4%) to Non-Hispanics (75.7%).

INCIDENCE OF PERSONAL CARE PRODUCTS USAGE AMONG MEN

	1988		Hispanic To Non-Hispanic Index
	Hispanic	Non-Hispanic	
After Shave Lotion/Cologne	87.7%	72.4%	121
Shaving Cream	80.4	75.7	106
Hair Styling Gel, Cream, or Oil	37.8	24.8	152
Electric Shaver	35.9	27.1	132

Source: Strategy Research Corporation

Hispanics also led Non-Hispanics in the use of hair styling products (gels, creams and oils), by 37.8% to 24.8%. Finally, in addition to their higher use of shaving creams, Hispanics are also more frequent users of electric shavers (35.9% of Hispanics use these appliances, compared with 27.1% for Non-Hispanics).



In sumarizing the results relating to use of personal care products, the Survey findings show a consistently higher use of these products by Hispanic, as compared to Non-Hispanic men.

VIII. OWNERSHIP PATTERNS

This section of the Report presents comparative data from Hispanic and Non-Hispanic households about ownership of various types of products. Specifically, both samples were questioned to establish the extent of telephone and home ownership, as well as ownership of home electronic appliances and motor vehicles.

A. TELEPHONE OWNERSHIP

All respondents were questioned to determine the incidence of telephone ownership, including whether the phone was listed or unlisted.

Among Hispanic households, 61.4% have telephones, compared with virtually 100% among Non-Hispanics.

INCIDENCE OF HOUSEHOLD TELEPHONE OWNERSHIP

	1988		Hispanic To Non-Hispanic Index
	Hispanic	Non-Hispanic	
Do Not Own Telephone	**38.6%**	**0.1%**	
Own Telephone	**61.4**	**99.9**	**61**
Listed	23.3	84.0	
Unlisted	38.1	15.9	

Source: Strategy Research Corporation

More than half of Hispanic households with telephones have unlisted numbers.

B. ELECTRONIC APPLIANCES

Both Hispanics as well as Non-Hispanics were questioned about ownership of household electronic appliances, such as stereos and VCRs.

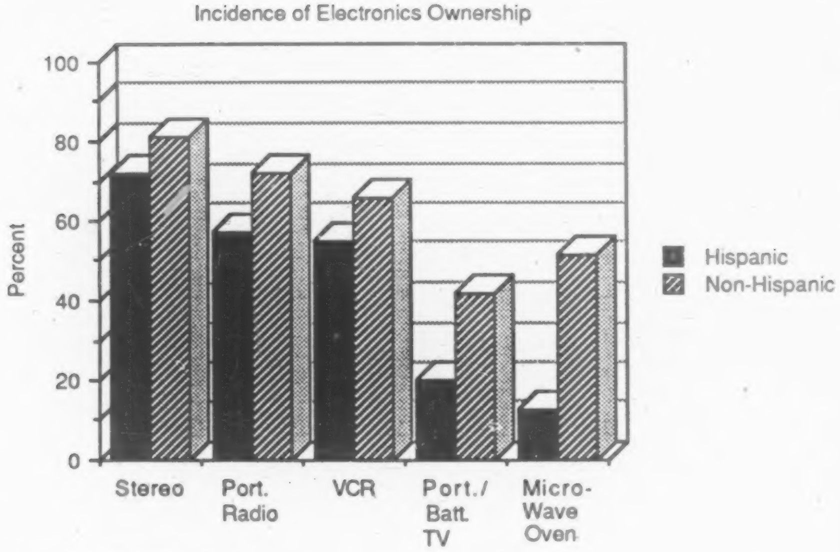
Stereos are the most frequently owned items among both Hispanics (71.9%) as well as Non-Hispanics (81.2%). They are followed in popularity by portable radio/stereos, the second most popular items in both Hispanic (57.3%) and Non-Hispanic (72.2%) households. VCRs are the appliances most often named in third place, again among Hispanics as well as Non-Hispanics.

INCIDENCE OF HOUSEHOLD ELECTRONICS OWNERSHIP

	1988		Hispanic To Non-Hispanic
	Hispanic	Non-Hispanic	Index
Stereo	71.9%	81.2%	89
Portable Radio/Stereo	57.3	72.2	79
Video Cassette Recorder (VCR)	54.9	65.6	84
Portable Battery Powered TV	20.0	41.7	48
Microwave Oven	12.7	51.4	25

Source: Strategy Research Corporation

While the extent of ownership of stereos and VCRs is generally parallel among Hispanics and Non-Hispanics, ownership rates differ widely for portable, battery-operated TVs and even more as regards microwave ovens. These items are found more often in Non-Hispanic households: ownership of microwave ovens is over four times more frequent in Non-Hispanic households.



Source: Strategy Research Corporation

C. AUTOMOBILES AND OTHER TYPES OF VEHICLES

1. Vehicle Ownership

All respondents were asked if they or other household members owned or leased an automobile, truck or other vehicle.

a. Vehicle Ownership/Leasing Among Hispanics And Non-Hispanics

Vehicle ownership/leasing is substantially higher among Non-Hispanics than among Hispanics. Nearly three times as many Non-Hispanics as Hispanics own or lease a vehicle (70.3% versus 24.3%).

VEHICLE OWNERSHIP

	1988		Ownership Index
	Hispanic	Non-Hispanic	Hispanic To Non-Hispanic
Vehicle Owners	**24.3%**	**70.3%**	**35**
One Vehicle	21.0	37.7	
Two Vehicles	3.1	23.7	
More Than Two Vehicles	0.2	8.9	
Non-Owners	**75.7**	**29.7**	
TOTAL	100.0%	100.0%	
Average Number Of Vehicles	0.3	1.2	

Source: Strategy Research Corporation

Hispanic households are also likely to own or lease fewer vehicles than Non-Hispanics: only 3.3% of Hispanic households own/lease two or more vehicles, as against 32.6% among Non-Hispanics.

b. Incidence Of Vehicles Purchased/Leased New

Among vehicle owning/leasing households, Non-Hispanics are at least three times more likely to own a vehicle purchased new than are Hispanics (73.6% versus 24.3%).

VEHICLES PURCHASED NEW/USED

	1988	
	Hispanic	Non-Hispanic
Vehicles Purchased New	24.3%	73.6%
Vehicles Purchased Used	75.7	26.4
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

2. Intention To Purchase/Lease New Vehicle Within Next Year

All respondents were asked if they planned to buy or lease a new car or other vehicle within the next year.

Intention to purchase a new vehicle is higher among Non-Hispanics (15.0%) than among Hispanics (10.3%).

INTENTION TO PURCHASE/LEASE NEW VEHICLE WITHIN THE NEXT YEAR

	1988	
	Hispanic	Non-Hispanic
Yes	10.3%	15.0%
No	89.7	85.0
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

3. Purchase Of Auto Accessories And Parts

Respondents in vehicle-owning households were asked about the purchase of auto parts and accessories in general, for do-it-yourself maintenance and repair, as well as about specific items bought during the past year.

Purchase of parts and accessories for do-it-yourself maintenance work is substantially higher among Hispanics. Nearly 75% of Hispanic households report the purchase of parts and accessories for do-it-yourself maintenance and repair, compared with 40.0% among Non-Hispanics.

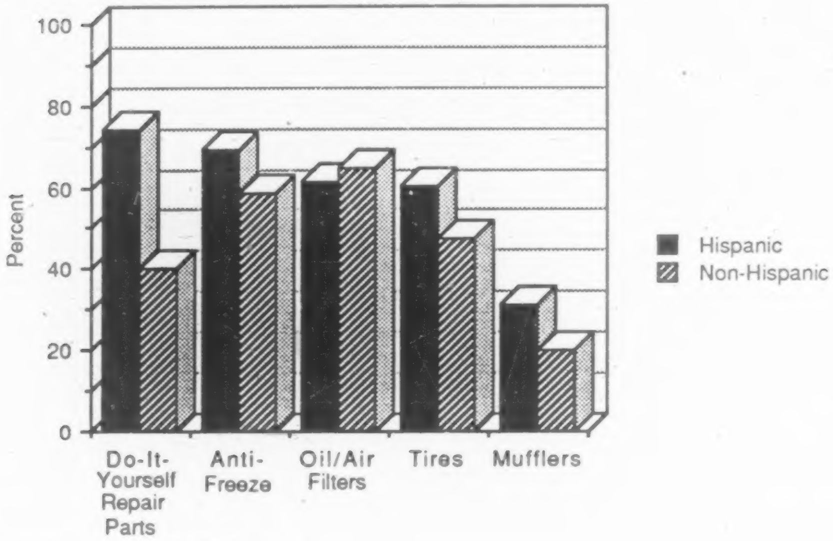
The proportions of Hispanics purchasing such specific items as anti-freeze, mufflers and tires for their vehicles is also higher than among Non-Hispanics.

PURCHASE OF AUTO ACCESSORIES/PARTS IN PAST YEAR
AMONG VEHICLE OWNERS

	1988		Hispanic To Non-Hispanic
	Hispanic	Non-Hispanic	Index
For Do-It-Yourself Maintenance Repair	74.5%	40.0%	186
Anti-Freeze	69.0	58.8	117
Oil/Air Filter	61.5	65.0	95
Tires	60.1	47.6	126
Mufflers	31.2	20.3	154

Source: Strategy Research Corporation

Incidence of Purchase of Auto Accessories/Parts Past Year



Source: Strategy Research Corporation

D. HOME OWNERSHIP

Home ownership has a significance beyond the simple acquisition of property: the decision to buy a home signifies putting down roots, establishing the family in a chosen area, and becoming part of a community. Respondents were asked about their present and future arrangements for home ownership.

1. Incidence Of Home Ownership

10.2% of Hispanics interviewed own their homes, in contrast to a corresponding figure approaching 50% among Non-Hispanics in the area.

HOME OWNERSHIP

	1988		Ownership/ Rental Index: Hispanic To Non-Hispanic
	Hispanic	Non-Hispanic	
Own Home	10.2%	48.2%	21
Rent	89.8	51.8	173
TOTAL	100.0%	100.0%	

Source: Strategy Research Corporation

2. Intention To Buy A Home Within The Next Year

Intention to buy a home is lower among Hispanics than among Non-Hispanics: among both renters as well as current home owners, Non-Hispanics are more likely than Hispanics to plan to buy a home -- or, if already home owners, another home -- within the next year.

INTENT TO PURCHASE A HOME WITHIN THE NEXT YEAR

	1988	
	Hispanic	Non-Hispanic
Among Home Owners	3.7%	9.8%
Among Renters	6.5	21.4

Source: Strategy Research Corporation

b. Intent To Purchase By Type Of Home

We asked intending home buyers what type of home they planned to buy.

The main preference among both Hispanics as well as Non-Hispanics, is for a single family home: 84.7% of Hispanics and 45.5% of Non-Hispanics planned to buy this type of residence.

PLAN TO BUY A HOME BY TYPE

	1988	
	Hispanic	Non-Hispanic
House	84.7%	45.5%
Co-Op	13.8	8.7
Condominium	1.5	22.3
Mobile Home	0.0	10.2
Townhouse	0.0	7.0
Duplex	0.0	6.3
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

The second preference of Hispanics concerning the future purchase of their own home is for a Co-Op and, of Non-Hispanics, for a Condominium.

3. Home Improvement Purchases

We asked all respondents if they or other family members had made any purchases at a home do-it-yourself store in the past year.

The incidence of do-it-yourself purchases at home stores is higher among Non-Hispanics (42.8%), than among Hispanics (32.4%).

INCIDENCE OF PURCHASE AT HOME DO-IT-YOURSELF STORE IN PAST YEAR

	1988	
	Hispanic	Non-Hispanic
Have Made Purchases	32.4%	42.8%
Have Not Made Purchases	67.6	57.2
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

IX. RELIGIOUS, SPORTS, SOCIAL AND RECREATIONAL ACTIVITIES

The activities of respondents tell us a good deal about their interests and also about their social and family organization. In order to gain a better understanding of social patterns and characteristics among Hispanics, we asked all respondents a series of questions concerning participation in religious, sports, social and recreational activities.

A. RELIGIOUS ACTIVITIES

We obtained an effective measure of the extent of participation of respondents in religious activities by asking whether they had been to a church or synagogue in the past two weeks.

Approximately half of all respondents had been to a church or synagogue and this proportion was slightly lower among Hispanics (48.9%), than among Non-Hispanics (53.5%).

INCIDENCE OF VISITING CHURCH/SYNAGOGUE WITHIN PAST FOURTEEN DAYS

	1988	
	Hispanic	Non-Hispanic
Yes	48.9%	53.5%
No	51.1	46.5
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

B. ATTENDANCE AT FAMILY EVENTS AND ATTRACTIONS

Respondents were asked if they had attended any of a series of activities and events in the past year. The list included both family events (weddings, baptisms, etc.) and attractions (circus, off-track betting).

Hispanics are *more* inclined than Non-Hispanics to attend such family oriented events as "Quince" celebrations and baptisms, *less* inclined than Non-Hispanics to go to family reunions, cookouts and picnics, weddings and live concerts.

ATTRACTIONS/EVENTS ATTENDED IN THE PAST YEAR

	1988	
	Hispanic	Non-Hispanic
Birthday Parties	64.8%	68.4%
Family Reunions/Cookouts/ Picnics	48.7	66.9
Baptism	41.3	27.2
Festivals/Local Parades	37.0	60.3
Weddings	36.0	58.5
Live Concerts	26.9	40.6
"Quince" Party	20.8	3.1
The Circus	16.5	11.0
Off-Track Betting	7.5	8.2

Source: Strategy Research Corporation

Both Hispanics and Non-Hispanics are least attracted to Off-Track betting, mentioned by 8.2% of Non-Hispanics and by 7.5% of Hispanics.

C. MOVIE ATTENDANCE

Respondents were asked specifically about the frequency of movie attendance. Overall, Hispanics go to the movies only slightly less frequently than Non-Hispanics (7.2 times a year versus 7.6 times for Non-Hispanics).

FREQUENCY OF MOVIE ATTENDANCE

	1988	
	Hispanic	Non-Hispanic
More Than Once A Month	15.3%	16.7%
Once A Month	18.3	20.4
Once Every Two Months	11.0	8.2
Once Every 3 To 6 Months	17.6	16.9
Less Than Once Every Six Months	5.4	8.2
Never	32.4	29.6
TOTAL	100.0%	100.0%
Average Annual Frequency Of Going To Movies:	7.2	7.6

Source: Strategy Research Corporation

D. ATTENDANCE AT LIVE SPORTING EVENTS

The Study also looked at attendance at another category of attractions: live sporting events. Respondents were asked if they, or other members of their household, had been to any events of this type in the past year. These events included, among others, professional baseball games, professional wrestling, and jai-alai .

Hispanics have the same rate of attendance (20.4%) as Non-Hispanics at Yankee/Mets baseball games. These represent the most frequently attended sporting event among Hispanics and the second most popular among Non-Hispanics.

SPORTING EVENTS ATTENDED IN THE PAST YEAR

	1988	
	Hispanic	Non-Hispanic
Yankee/Mets Baseball Games	20.4%	20.4%
Atlantic City Casinos	9.9	22.8
Professional Wrestling	5.2	4.4
Horse Or Dog Races	2.1	10.5
Jai-Alai	1.4	3.7

Source: Strategy Research Corporation

With regard to attendance at Atlantic City casinos, horse and dog racing and jai-alai, Non-Hispanics show higher attendance than Hispanics. Professional wrestling is attended by a higher percentage of Hispanics (5.2%), than Non-Hispanics (4.4%).

E. VISITS TO AMUSEMENT PARKS

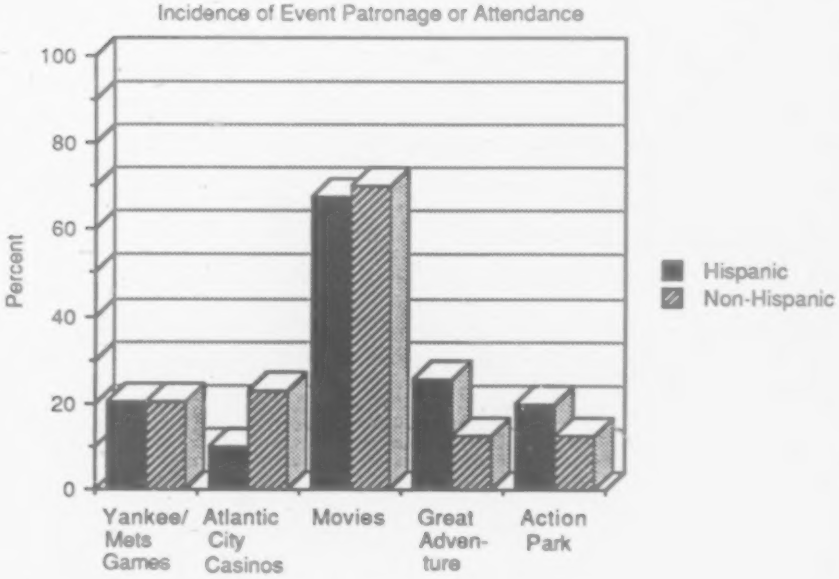
The Study looked at the popularity of visits to two of the area amusement parks: Great Adventure Park and Action Park. We asked all respondents if they, or other members of their households, had visited either of these parks in the past year.

Both these parks were more popular with Hispanics than with Non-Hispanics. Great Adventure Park had been visited by approximately twice as many Hispanics as Non-Hispanics (25.9% versus 12.8%); Action Park had been visited by 20.0% of Hispanics and by 12.5% of Non-Hispanics.

INCIDENCE OF VISITING AMUSEMENT PARKS

	1988	
	Hispanic	Non-Hispanic
Great Adventure Park	25.9%	12.8%
Action Park	20.0	12.5

Source: Strategy Research Corporation



Source: Strategy Research Corporation

X. AIRLINE TRAVEL PATTERNS

Peoples origins can reflect the journeys they make. Travel patterns, as well as the reasons for travel, can tell us about the background of the traveller. In this Study we asked both Hispanic as well as Non-Hispanic respondents about the reasons for and the destinations of their last trip.

A. INCIDENCE OF TRAVEL

Approximately one fifth (20.9%) of New York area Hispanics travelled by air within the past year.

INCIDENCE OF AIRLINE TRAVEL
WITHIN THE PAST YEAR

	1988	
	Hispanic	Non-Hispanic
Yes	20.9%	58.5%
No	79.1	41.5
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

This proportion is only one-third that of Non-Hispanics who had made an airline trip in the past twelve months.

B. PURPOSE OF AIRLINE TRAVEL

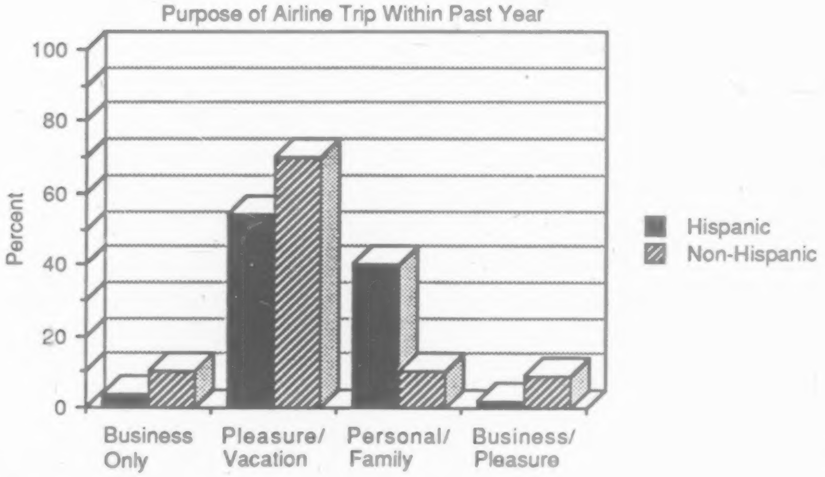
The most frequently mentioned reason for travelling by air is for pleasure/vacation. Over half of all Hispanics (54.1%) and over two-thirds of Non-Hispanics (69.9%) mentioned pleasure/vacation as the purpose of their last trip.

PURPOSE OF AIRLINE TRAVEL
WITHIN PAST YEAR

	1988	
	Hispanic	Non-Hispanic
Business Only	3.8%	10.4%
Pleasure/Vacation	54.1	69.9
Personal/Family	40.2	10.5
Business/Pleasure	1.9	9.2
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

The second most frequent motive for airline travel among Hispanics is for personal/family reasons, given by more than 40%. This category includes travel for educational purposes, for formal celebrations such as weddings and for visits by grandparents to their grandchildren. Among Hispanics, this category of travel is basically for family, rather than for other personal purposes. Non-Hispanics are more likely to have travelled by air for reasons which combined business and pleasure (9.2%) than are Hispanics (1.9%).



Source: Strategy Research Corporation

C. FLIGHT DESTINATIONS

Air travelers were asked the destination of their last flight within the past year.

The two most frequently mentioned destinations by Hispanics were Puerto Rico (by 42.2%) and the Dominican Republic (by 27.5%). Among Non-Hispanics, the top mentioned destinations were other areas of the Caribbean, excluding Puerto Rico and the Dominican Republic (12.1%), Los Angeles (11.5%), and Miami (10.5%). More than 1 in 4 Non-Hispanic air travelers had last traveled to Florida.

DESTINATION OF LAST AIRLINE TRIP
WITHIN PAST YEAR

	1988	
	Hispanic	Non-Hispanic
Caribbean	**78.9%**	**16.4%**
Puerto Rico	42.2	4.3
Dominican Republic	27.5	0.0
Other Caribbean	9.2	12.1
North America & Mexico	**6.6**	**46.1**
Mexico	2.2	0.5
Los Angeles	1.7	11.5
Northeast U.S.	1.8	5.4
Southwest U.S.	0.0	5.8
Southeast U.S.	0.0	9.3
Midwest U.S.	0.0	3.2
Other	0.9	10.3
Central & South America	**7.5**	**0.0**
Florida	**5.3**	**28.5**
Orlando	2.7	4.2
Miami	1.9	10.5
Tampa	0.0	3.0
Other Florida	0.7	10.7
Europe, Africa, Orient	**1.7**	**9.0**
TOTAL	**100.0%**	**100.0%**

Source: Strategy Research Corporation

A total of 9.0% of Non-Hispanics and 1.7% of Hispanics mentioned destinations in Europe, Africa or the Orient.

XI. EXECUTIVE SUMMARY

- The New York area has the second largest Hispanic population in the United States after Los Angeles.
- The 1988 Hispanic population of the 28-county New York ADI is estimated at just over 2.5 million, or 13.1% of the total area population. Hispanic population size has increased by 23.6% over the area Hispanic population for 1980.
- There are an estimated 820,200 households in the New York ADI headed by Hispanics, representing 11.5% of all area households.
- The largest percentage (approximately 45%) of Latin heads of household are of Puerto Rican origin. People from the Dominican Republic make up the second largest nationality among area heads of household, with nearly 28% incidence. Approximately 19% of households are headed by people from South and Central America, and this is the sector of most rapid growth.
- Approximately 90% of Hispanics were born in another country.
- The average length of residence of Hispanic heads of household in the New York area is 15 years.
- Average household size is larger among Hispanics (3.1 persons) than Non-Hispanics (2.7).
- New York Hispanics are younger than Non-Hispanics: the average age for Hispanics is 27.8 years, compared with 36.8 for Non-Hispanics.
- Thirty two percent of New York Hispanics hold white collar jobs, 34.7% work in blue collar jobs.
- Currently, there are 1.3 persons with full-time employment in Latin households. This is the same figure as in Non-Hispanic households.
- Approximately half of Latin heads of household have completed high school.
- Total annual household income for Hispanics averages $26,121. The corresponding figure for Non-Hispanics is $39,662.
- This represents an adjusted annual buying power for New York Hispanics of $18.9 billion.
- Spanish is the primary language of Latins at home and on social occasions; at work, nearly two out of three speak both Spanish and English, or only English.
- Hispanics attach great importance to preserving their language: more than 93% feel that it is "very important" for their children to read and write Spanish perfectly.
- In addition to language, Hispanics emphasize the importance of traditional cultural values and show pride in their heritage. Aspects such as family ties and enjoyment of Latin music are instances of continuing identification with their culture.

- Weekly food store expenditures average $99.83 for Hispanic households and $98.13 for Non-Hispanics. The figure for Hispanics does not include expenditure on butcher meat, usually bought in Latin carnicerías.

- Hispanics consume more candy products (cookies, candy bars and fruit roll-ups/snacks) than Non-Hispanics.

- In the area of soft drinks, consumption by Hispanics of regular (non-diet) beverages is higher than for Non-Hispanics (88.9% versus 77.6%). However, Non-Hispanics consume more diet soft drinks (50.9% compared with 30.9%).

- Both male and female Latins use more cosmetics/personal care products than do Non-Hispanics. Hispanic women are heavier users of -- among other products -- lipstick (90.3% versus 85.8%), nail polish (82.2% versus 70.7%), and blush (80.9% versus 69.3%).

- Sixty one percent of New York Hispanic households have telephones, compared with virtually 100% telephone ownership among Non-Hispanic households. More than half of the Hispanic households with telephones have unlisted numbers.

- Twenty four percent of Hispanic households have a car, truck or other vehicle. This rate of ownership compares with 70% vehicle-owning households among Non-Hispanics.

- Ten percent of Hispanics plan to purchase or lease a new vehicle within the next year.

- More than 74% of Hispanic vehicle owners had purchased auto parts or accessories for do-it-yourself maintenance and repair during the past year. In addition, 69% had bought anti-freeze, 61% oil/air filters, 60% tires and 31%, mufflers. These proportions are, in most cases, lower among Non-Hispanic vehicle owners.

- As regards home ownership, approximately 10% of Hispanics own their homes, versus a proportion of about 48% for Non-Hispanics.

- More Non-Hispanics (9.8%) than Hispanics (3.7%), plan to buy a home within the next year. The majority of Hispanics (84.7%) favored houses over other types of home.

- Thirty two percent of Hispanics had made a purchase at a home do-it-yourself store during the past year, compared with nearly 43% of Non-Hispanics.

- Hispanics are more likely than Non-Hispanics to attend such social events as "Quince" celebrations and baptisms. They are less likely than Non-Hispanics to go to picnics and live concerts.

- Hispanics go to the movies about as often as Non-Hispanics: on average, approximately seven times a year.

- Yankee/Mets baseball games are equally popular with Hispanics and Non-Hispanics: twenty percent of all respondents have gone to see them play in the past year.

- Great Adventure Park and Action Park are more popular with Hispanics than with Non-Hispanics: more than 25% of Hispanics have visited Great Adventure Park, compared with approximately 13% of Non-Hispanics.

- Approximately 21% of Hispanics and 58% of Non-Hispanics had travelled by air within the past year.

- For both Hispanics and Non-Hispanics, the main reason for travel was for pleasure/vacation. In second place, Hispanics travelled for personal/family reasons.

- The main flight destinations for Hispanic air travellers are Puerto Rico (42.2%) and the Dominican Republic (27.5%). Non-Hispanics travelled to the Caribbean area, Los Angeles and Miami.

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THE 1988 SAN ANTONIO HISPANIC MARKET

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FOREWORD

This Study, *THE 1988 SAN ANTONIO HISPANIC MARKET*, is the most recent in the series of Hispanic Market Studies conducted and published by Strategy Research Corporation over the past 17 years. It is the second Study dealing specifically with the San Antonio area.

This series of studies conducted by Strategy Research Corporation presents current population data, market profile information, shopping pattern data, and product usage information to the marketing practitioners of the U.S. These data have been used by public and private sector demographers, planners and marketers to develop reliable and effective programs.

41
KWEX-TV
LO NUESTRO

JOSE C. CANCELA
General Manager

March 18, 1988

Dear Friend;

On behalf of KWEX-TV I am pleased to present to you the "1988 San Antonio Hispanic Market Study". The first in depth research piece ever done in what is the 4th largest Hispanic market today.

Our Hispanic community is on the move, we are building businesses, making jobs, and creating wealth. Our contributions to economic growth and prosperity of San Antonio and all of South Texas is significant. Our culture, ideas, and values make San Antonio the fascinating place it is.

KWEX is proud of being the first in commissioning such an in depth study, it was long overdue.

We hope that the data provided in this report will answer some of the questions that you have regarding the San Antonio Hispanic Market and further your understanding of our evergrowing " MARKET WITHIN THE MARKET".

Most Cordially,

Jose Cancela

JC/jt

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PREFACE

SAN ANTONIO **HISPANIC CHAMBER** OF COMMERCE

Benjamin E. Rodriguez
Chairman of the Board

March 31, 1988

Dear Participants:

Welcome to our beautiful city!!!

It is a pleasure to contribute this PREFACE TO THE 1988 SAN ANTONIO HISPANIC MARKET STUDY.

San Antonio is recognized as a vital center for the health care, computer, insurance and real estate industries. The long term association with the Hispanic culture and tradition of our Mexican American founders has contributed greatly to the success of modern day San Antonio.

We thank Strategy Research Corporation and KWEX Channel 41 for their efforts in providing us with this Report and Seminar which gives us an opportunity to learn about today's San Antonio Hispanic community.

Bienvenidos a San Antonio!!!

Sincerely,

Benjamin E. Rodriguez
Chairman
San Antonio Hispanic Chamber of Commerce

One Ten Broadway, Suite 50 ■ San Antonio, Texas 78205 ■ 512/225-0462

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I. PURPOSE, SCOPE AND METHODOLOGY

A. PURPOSE OF THE STUDY

San Antonio is Texas' third largest metropolitan area after Dallas and Houston, and it ranks fourth in terms of U.S. Hispanic population -- surpassed only by Los Angeles, New York, and Miami. This *1988 San Antonio Hispanic Market Study* estimates the current Hispanic population of the San Antonio area at 972,300.

With a strong and vibrant Mexican heritage, San Antonio has become the new hometown for many Hispanics in the eighties. The Hispanic community has become one of the fastest growing segments in the San Antonio area. In Bexar County alone, the Hispanic population has grown 57% since 1980. And growth in the eighties, as projected, will exceed the growth of the sixties and seventies.

The objective of this Study is to provide up-to-date data on this large and growing market that offers marketers scope, opportunity and challenge. This objective has been addressed by considering and evaluating several key aspects of this market:

- Demographic Characteristics: What is the size of the Hispanic market? What are the components and countries of origin of San Antonio Hispanics? How long have they lived in the area?
- Social Characteristics: A range of social/lifestyle behavior, including family size, work, education, and language usage were explored.
- Purchase and Ownership Patterns: What are San Antonio Hispanics' priorities and habits with respect to financial expenditure?

To attain these objectives, Strategy Research Corporation planned a Study using as a basis the Survey Research Methodology. Employed was a carefully studied and comprehensive sample design, a detailed questionnaire which incorporated the areas and topics of concern was constructed and tested, and effective fieldwork controls throughout the data gathering phase of the Study was implemented.

The results of this planning have yielded, in this *1988 San Antonio Hispanic Market Study*, a thoroughly detailed and up-to-date database for reaching this unique and dynamic sector.

B. SCOPE OF THE STUDY

The Scope of this Study is the San Antonio market. The market center is Bexar County, which is the primary county of the 25-county ADI (Area of Dominant Influence) and Metropolitan Area (Bexar, Comal and Guadalupe Counties).

The Study presents secondary population statistics and primary demographic data.

COUNTIES COMPRISING THE SAN ANTONIO ADI

Atascosa
Bandera
Bexar
Comal

DeWitt
Dimmit
Edwards
Frio

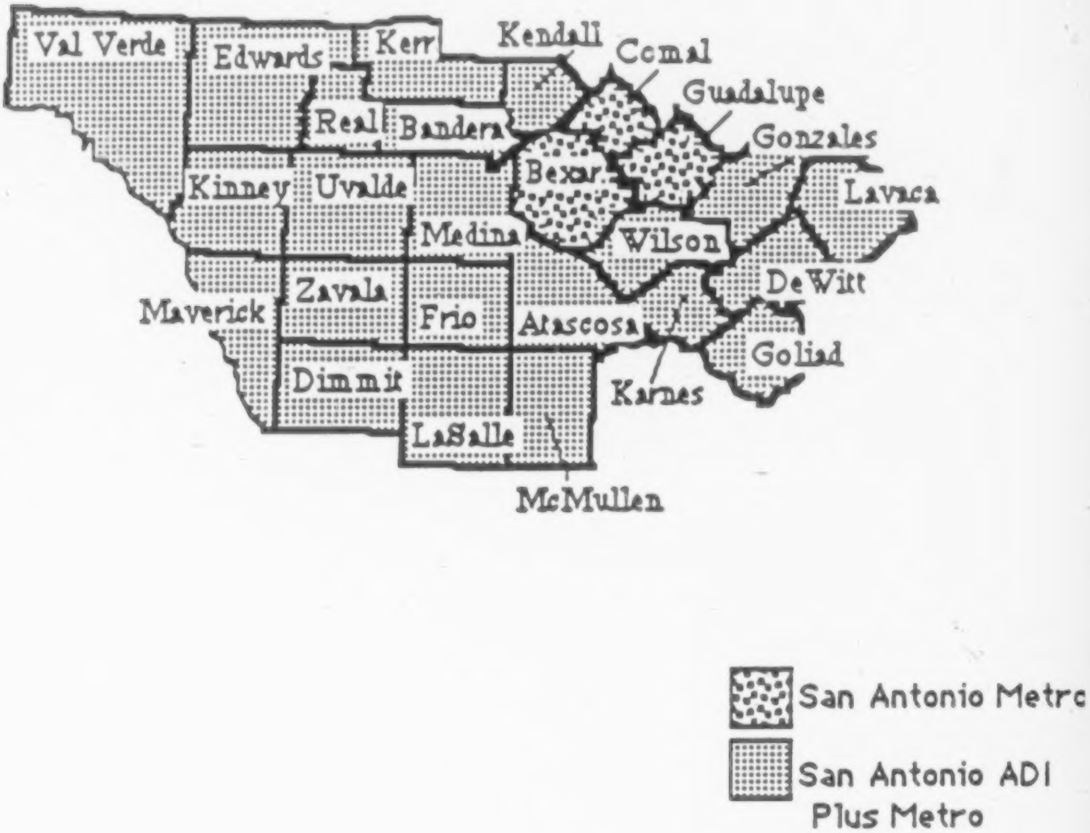
Goliad
Gonzales
Guadalupe
Karnes

Kendall
Kerr
Kinney
La Salle

Lavaca
Maverick
McMullen
Medina

Real
Uvalde
Val Verde
Wilson
Zavala

SAN ANTONIO, TEXAS ADI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Kerr
Kendall
Comal
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C. METHODOLOGY EMPLOYED

Strategy Research Corporation conducted both primary and secondary research in the gathering of information provided in this Report.

Secondary data sources are cited such as the publications of the U.S. Department of Commerce, Bureau of the Census, including both census findings and projections. State and Federal sources were also used, as well as material from Government sources dealing with Hispanics in the United States.

Population totals are drawn from U.S. Department of Commerce, Bureau of the Census published reports. Population forecasts utilized in the Study were made by Strategy Research Corporation.

With regard to the primary data presented in this Study, the methodology utilized was the Survey Research Method.

A total of 808 personal, face-to-face interviews were conducted with Hispanic heads of households.

The sampling method utilized a stratified, segmented, random probability sample of Hispanic households.

The sample was drawn by Strategy Research Corporation's professional sampling staff. A Clustering technique was used, procedural in samples for in-home interviews. The sampling cluster points were actual Census blocks as designated by the Bureau of the Census. SRC maintains currently updated Census block, Census tract, and household data for survey and economic research purposes. A random probability sample was pulled, using a random starting point and a sequential interval of persons.

Once a random skip pattern was established, sampling points were assigned to their appropriate Census blocks. These statistics were transferred to Census block maps and then to street maps. For each block, one of six random house selection patterns was chosen randomly, and individual block maps were labeled with street names, starting points, skip patterns, and rotation directions. Nine interviews were completed within each cluster, which consists of one sample block.

All surveys consisted of personal, in-home, face-to-face interviews. These interviews were conducted by trained, professional interviewers of Strategy Research Corporation, working under direct supervision of Strategy Research Corporation staff Field Supervisors.

All interviewers were bilingual and of Hispanic origin. Interviewers were carefully trained in the use of the questionnaire and in the conduct of the interview.

A minimum of 20 percent of each interviewer's work was validated daily by staff Supervisors of Strategy Research Corporation. All questionnaires were then carefully edited, coded and prepared for computer tabulation.

All programming and data processing was done in-house by Strategy Research Corporation personnel. SRC operates a major in-house marketing research main frame computer facility.

Interviewing for this Study was conducted in February, 1988.

Technical Note:

The definition of a Hispanic is a person who designates himself or herself to be of Latin (Hispanic) origin or of Latin (Hispanic) ancestry. This is the same definition currently employed by the Bureau of the Census.

Strategy Research Corporation employs the best of industry practices and standards in its work and utilizes the best efforts to produce reliable studies. Nevertheless, no claim is made that the Study is free of all errors, and the Firm accepts no liability for the information or interpretation within this Report.

II. THE HISPANIC UNIVERSE

A. INTRODUCTION

San Antonio is the fourth largest Hispanic market in the United States, and one with a rich Hispanic heritage. Established as a Spanish military base in the early eighteenth century, San Antonio is, two centuries later, a booming sunbelt city with a diverse economy based on trade, manufacturing, services, construction, and tourism.

The San Antonio Metropolitan Area consists of Bexar, Comal and Guadalupe Counties. As of January 1988, the total Hispanic population in the Metropolitan Area is estimated at 731,600 persons. This figure represents 48.4% of the total population in this tri-county market area. Within Bexar County, the largest county in the market area, Hispanics comprise 50.4% of the population. And, more than nine out of ten Hispanics in the tri-county area reside in Bexar County.

Bexar County's Hispanics are spread throughout the County. However, heavier Hispanic concentrations are found in the west, southwest and south/central regions of the County.

The San Antonio Metropolitan Area, when extended to include 22 additional adjacent counties, results in the San Antonio ADI (Area of Dominant Influence). Together, these 25 contiguous counties represent a Hispanic population of 943,000 persons. Nevertheless, the San Antonio Metropolitan Area (Bexar, Comal and Guadalupe Counties) accounts for almost 80% of the San Antonio ADI Hispanic population.

Virtually all Hispanics in the San Antonio area are of Mexican origin or descent.

This section of the Report discusses the history and development of the San Antonio Hispanic market and cites the population growth of the area from 1970 to 1988. These data are then expressed in terms of household size and number of households in the Hispanic community.

The next sub-section presents a short history of the Hispanic populace in San Antonio and recaps the historical evolution of the Hispanic influence in San Antonio.

B. HISTORY OF SAN ANTONIO'S HISPANIC MARKET

San Antonio has developed over three hundred years from one of the oldest settlements in the southwestern United States to an ADI of approximately two million inhabitants, of whom nearly half are Hispanics. San Antonio's Hispanic roots go back to the early origins of the city. More than nine of ten San Antonio Hispanics are of Mexican origin.

The City Of San Antonio covers about 263 square miles (681 square kms.). The San Antonio MSA (Metropolitan Statistical Area) comprised of Bexar, Comal and Guadalupe Counties, covers 2,531 square miles.

The structure of the economy is based on a diversified mix of industries, including the government/military sector, tourism, health care and finance.

Early History

The Coahuiltecan Indians, the first inhabitants of San Antonio, were attracted to the banks of the San Antonio River for its life-giving water. They called the river *Yanaguana*, or "refreshing waters."

On June 13, 1691 Domingo Teran de los Rios, governor of Texas, accompanied by Father Damian Massanet and his Franciscan friars led a Spanish expedition to the area now known as San Antonio. Upon their arrival they encountered a Coahuiltecan Indian village on the upper headwaters of the river that now winds itself through downtown San Antonio. The explorers named the site San Antonio de Padua in honor of the saint whose feast day it was.

No permanent settlement was made, however, until 1718. A town named Villa de Bejar (later called Bexar) was established by a Franciscan missionary and the Spanish governor of the region. They also built a fort -- Presidio de Bejar -- and the Mission San Antonio de Valero (later known as the Alamo). Other Spanish missions and settlements were established in the area before the end of the 18th. Century.

The missions prospered and expanded, then declined following secularization in 1793 and the waning of the Spanish political influence. After the secularization of the Mission San Antonio de Valero, Mexican troops were quartered in the plaza area.

Mexico won its independence from Spain in 1821 and San Antonio came under Mexican rule. San Antonio participated importantly in Mexico's struggle for independence from Spain from 1810 to 1821. Several major battles were fought there from 1810 to 1813, and *Diez y Seis de Septiembre* (Mexican Independence Day) remains an important celebration in San Antonio.

From 1821 to 1836, San Antonio grew and prospered further as a result of Anglo-American colonization in the area. The intervening years were marked by the settlers' increasing restlessness and by efforts to make themselves independent of Mexican rule. The most celebrated episode of these years was the siege of the Alamo in 1836. In the same year, Texas proclaimed its independence following the Battle of San Jacinto.

In 1837, San Antonio was incorporated as a city of the Republic of Texas. The city began to grow rapidly after 1845, when the Republic of Texas joined the United States as the 28th state in the Union. Following the Civil War, San Antonio thrived as a stop along cattle trails to Kansas. Businesses developed to trade in leather goods and supplies for cattle ranchers. San Antonio's first railroad, the Southern Pacific Railroad, came to the city in 1877, further increasing the population.

In 1891 the first Battle of Flowers Parade, and the forerunner of today's *Fiesta*, was planned to celebrate President Benjamin Harrison's visit to San Antonio and the anniversary of the Battle of San Jacinto. The parade, which was modeled after Mexico City's famous flower parade, was later to become an annual event taking place during the month of April in San Antonio.

Recent Developments

In this century, the development of the San Antonio area has received impetus through the discovery of oil in the State, although it has not experienced the explosive population and economic growth of Dallas and Houston. A more prominent contribution to its economy was provided through the military establishment. Originally established as a Spanish military post, San Antonio has always been militarily important. Fort Sam Houston, a U.S. Army outpost established in 1845, and officially named after the first President of the Republic of Texas, developed into a major military center. After the United States entered World War I in 1917, San Antonio served as an important military training and supply center. The population grew from 96,614 in 1910 to 161,379 in 1920. In World War II, existing air bases and facilities were expanded and new ones built near San Antonio. Military bases represent the major source of employment in the area.

Tourism is an established and thriving activity important to the economy of the San Antonio area. The city's Hispanic heritage, culture and its interesting history are reflected in a number of local events, including the San Antonio *Fiesta*, *Las Posadas* and the observance of Mexican Independence Day.

More recently, San Antonio has become a center for the health care industry. Other sectors contributing to recent economic growth in the city are those of finance, computers, insurance and real estate.

Hispanic-Americans In San Antonio Today

San Antonio attracted nationwide notice when, in 1981, Henry G. Cisneros was voted Mayor, making San Antonio the first major U.S. city to elect a Hispanic-American to the office of Mayor. To many, this event marked the recognition of the political maturity of local Hispanic-Americans, a long ignored sector of the community. The election was the reward for years of political struggle on the part of this sector, determined to have a role in local planning and policies commensurate with their numbers and their growing economic status. In the 1977 elections they gained five seats on the City Council and with them, an established voice in local government.

It is important to keep in mind that the goals of San Antonio Hispanic leaders were not limited to the advancement of the interests of their sector, but rather to the well being of the community as a whole. In the "Communities Organized For Public Service" *(COPS)* Hispanics developed a dynamic answer to the problem of making community needs felt.

San Antonio Hispanics tend to be characterized by their youth and by their long residence in the area. With a Hispanic population of approximately 943,000 San Antonio is the fourth largest Hispanic Market in the U.S. Like Los Angeles, this is a young market: more than 40% of area Hispanics are under 18 and 69% are under 35. Unlike other U.S. Hispanic markets, San Antonio has a long-established and stable Hispanic population: more than 63% of Hispanic heads of household have lived in the area for over 25 years.

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C. THE SAN ANTONIO MARKET AREA

San Antonio ADI (Area of Dominant Influence)

The San Antonio Market is comprised of 25 counties. The total population of the ADI is estimated at 1,946,700 persons. The total Hispanic population in the ADI is estimated at nearly one million (943,000) persons, accounting for 48.4% of the total population.

Bexar County, with an estimated total population of 1,388,700 persons as of January, 1988 is the most populated county in this market. The Hispanic population in Bexar County is estimated at 699,900 which is 50.4% of the total county population.

San Antonio Metropolitan Area

The San Antonio Metropolitan Area is comprised of three counties. The total population of the Metro Area is estimated to be 1,512,300 persons. A total of 731,600 Hispanics reside in the San Antonio Metro Area representing almost half (48.4%) of the total Metro Area population.

Guadalupe County, the second largest county in the market, is projected to have an overall population of 69,600 persons and a Hispanic population of 18,300 persons.

The Hispanic population, overall, is highly concentrated in Bexar County. Almost 80% of the Hispanic population of the San Antonio ADI resides within the tri-county San Antonio Metro Area.

D. TOTAL POPULATION GROWTH OF THE SAN ANTONIO METRO AREA: 1960-1988

Total population growth in the recent three decades has been significant for the San Antonio Metropolitan Area. The total population of this tri-county area increased by more than 776,055 people between 1960 and 1988. This represents an increase in total population of 105%.

The most recent growth rate (between 1980 and 1988) registers at 41.1%, which is twice as high as the growth rate between 1970 and 1980, as well as between 1960 and 1970.

POPULATION LEVELS AND GROWTH RATES
IN THE SAN ANTONIO METRO AREA
1960-1988

Year	Total Population	Percent Change
1960	736,245	
1970	888,179	20.6%
1980	1,072,125	20.7
1988	1,512,300	41.1

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Currently, Strategy Research Corporation estimates the January 1, 1988 San Antonio Metropolitan population at 1,512,300 which represents an increase of 440,175 persons since 1980.

E. HISPANIC POPULATION GROWTH OF THE SAN ANTONIO METRO AREA: 1970-1988

The Hispanic population in the San Antonio Metro Area has shown a steady increase since 1970.

The Hispanic population in 1970, according to the U.S. Bureau of the Census, was 320,600 persons. This represented 36.1% of the total population of the Metro Area at that time. By April 1, 1980, San Antonio's Hispanic population had grown to 481,500 persons which represented 44.9% of the total population.

HISPANIC POPULATION
SAN ANTONIO METRO AREA
1970-1988

Year	Total Population	Hispanic Population	Percent Hispanic
1970	888,179	320,600	36.1%
1980	1,072,125	481,500	44.9
1988	1,512,300	731,600	48.4

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Strategy Research Corporation estimates the January 1, 1988 Hispanic population of the San Antonio tri-county Metro Area to be 731,600 persons, which represents approximately 48.4% of the total Metro Area population.

F. CURRENT POPULATION OF THE SAN ANTONIO METRO AREA

Bexar, Comal and Guadalupe Counties comprise the San Antonio Metro Area. Individually, Bexar County - with a significant Hispanic population of 699,900 - constitutes the largest Hispanic populated county, not only in the Metropolitan Area, but also within the ADI. Currently, over half (50.4%) of Bexar County's population is of Hispanic origin/descent.

POPULATION
SAN ANTONIO METROPOLITAN AREA
AS OF JANUARY 1, 1988

County	Hispanic Population (000)	Percent of Total Population	Total Population (000)
Bexar	699.9	50.4%	1,388.7
Comal	13.4	24.8	54.0
Guadalupe	18.3	26.3	69.6
TOTAL	731.6	48.4%	1,512.3

Source: Strategy Research Corporation

Guadalupe County, hosting a total population base of approximately 69,600 persons, is presently 26.3% Hispanic. Similarly, Hispanics in Comal County represent 24.8% of that county's overall population.

G. HISPANIC CONTRIBUTION TO DEMOGRAPHIC GROWTH: 1970 - 1988

From 1970 to 1980 the Hispanic population shows a substantial growth of 50.2%, at the same time as the non-Hispanic population increased by only 4.1%.

The 1988 estimates show Hispanic population continuing to grow at a fast pace. At the same time, the non-Hispanic population has also increased significantly. Specifically, from 1980 to 1988, non-Hispanic growth in the San Antonio Metro Area grew by 32.2%, while the growth of Hispanics displays an even greater percentage increase (51.9%).

HISPANIC VS. NON-HISPANIC POPULATION GROWTH IN THE SAN ANTONIO METRO AREA 1970-1988

	1970	1980	Net Change 1970-1980	Percent Change 1970-1980	1988	Net Change 1980-1988	Percent Change 1980-1988
Non-Hispanic	567,579	590,625	23,046	4.1%	780,700	190,075	32.2%
Hispanic	320,600	481,500	160,900	50.2%	731,600	250,100	51.9
TOTAL	888,179	1,072,125	183,946	21.4%	1,512,300	440,175	41.1%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Increases on the part of both Hispanic as well as non-Hispanic populations push the total San Antonio Metropolitan population to over 1.5 million.

H. HISPANIC POPULATION OF THE SAN ANTONIO ADI

All 25 of the counties in the San Antonio ADI showed increases in Hispanic populations since 1980. These increases range from less than 1% to 79%. The three counties with the highest percentages of Hispanics are Maverick (92.1%), Zavala (88.9%) and Dimmit (78.2%). The largest increase in terms of absolute numbers - 239,000 - was seen in Bexar County.

HISPANIC POPULATION GROWTH (SAN ANTONIO ADI)
1980-1988

County	1980 Hispanic Population	1988 Hispanic Population	1980-1988 Percent Increase	Percent Hispanic 1988
Atascosa	12,000	17,400	45.0%	49.4%
Bandera	900	1,500	66.6	16.1
Bexar	460,900	699,900	51.9	50.4
Comal	8,700	13,400	54.0	24.8
De Witt	4,400	5,600	27.3	24.3
Dimmit	8,800	11,100	26.1	78.2
Edwards	1,000	1,200	20.0	52.2
Frio	9,400	12,600	34.0	70.4
Goliad	1,800	2,300	27.8	38.3
Gonzales	4,900	6,400	30.6	31.4
Guadalupe	11,900	18,300	53.8	26.3
Karnes	5,800	7,200	24.1	44.2
Kendall	1,400	2,500	78.6	13.3
Kerr	3,900	6,200	59.0	15.0
Kinney	1,300	1,800	38.5	56.3
La Salle	4,100	5,300	29.3	74.6
Lavaca	1,300	1,600	23.1	7.3
McMullen	300	300	--	37.5
Maverick	28,400	43,100	51.8	92.1
Medina	10,000	13,600	36.0	44.7
Real	600	700	16.7	23.3
Uvalde	12,400	16,900	36.3	58.5
Val Verde	22,600	32,900	45.6	65.7
Wilson	6,100	9,200	50.8	38.3
Zavala	10,400	12,000	15.4	88.9
TOTAL S.A. ADI	633,300	943,000	48.9%	48.4%
TOTAL S.A. METRO	481,500	731,600	51.9%	48.4%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

I. NUMBER OF HOUSEHOLDS

There are 201,300 Hispanic households in the San Antonio Metropolitan Area, and about 192,800 of these households are in Bexar County.

Overall, the tri-county Metropolitan Area accounts for 79% of all Hispanic households within the ADI.

SAN ANTONIO METRO AREA
HOUSEHOLD STATISTICS
1988

Population Segment	Population	Households	Persons Per Household	Percent Distribution
Hispanic	731,600	201,300	3.6	42.8%
Non-Hispanic	780,700	269,207	2.9	57.2
TOTAL	1,512,300	470,507	3.2	100.0%

Source: Strategy Research Corporation

The average size of the Hispanic household is 3.6, which is larger than that of the non-Hispanic household (2.9 persons per household).

J. HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION

With nearly two million total persons (1,946,700) and nearly one million Hispanics (943,000), Hispanics currently constitute 48.4% of the total San Antonio ADI population.

Bexar County is the ADI's most heavily populated county overall (1,388,700 persons). Approximately one-half (50.4%) of Bexar is comprised of persons of Hispanic origin/descent.

With the exception of Lavaca County, which has a Hispanic population equivalent to 7.3% of its total population, the remaining 24 constituent counties all host a Hispanic population complementing their total by at least 13% to 92%.

SAN ANTONIO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
JANUARY 1, 1988

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Atascosa	TX	17.4	4.7	49.4%	35.2
Bandera	TX	1.5	0.4	16.1	9.3
Bexar	TX	699.9	192.8	50.4	1,388.7
Comal	TX	13.4	3.5	24.8	54.0
De Witt	TX	5.6	1.5	24.3	23.0
Dimmit	TX	11.1	2.7	78.2	14.2
Edwards	TX	1.2	0.3	52.2	2.3
Frio	TX	12.6	3.2	70.4	17.9
Goliad	TX	2.3	0.7	38.3	6.0
Gonzales	TX	6.4	1.6	31.4	20.4
Guadalupe	TX	18.3	5.0	26.3	69.6
Karnes	TX	7.2	1.9	44.2	16.3
Kendall	TX	2.5	0.6	13.3	18.8
Kerr	TX	6.2	1.6	15.0	41.3
Kinney	TX	1.8	0.5	56.3	3.2
La Salle	TX	5.3	1.4	74.6	7.1

Continued. . .

SAN ANTONIO
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
JANUARY 1, 1988
(CONTINUED)

County	State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Lavaca	TX	1.6	0.4	7.3%	21.9
McMullen	TX	0.3	0.1	37.5	0.8
Maverick	TX	43.1	10.1	92.1	46.8
Medina	TX	13.6	3.6	44.7	30.4
Real	TX	0.7	0.2	23.3	3.0
Uvalde	TX	16.9	4.1	58.5	28.9
Val Verde	TX	32.9	7.9	65.7	50.1
Wilson	TX	9.2	2.5	38.3	24.0
Zavala	TX	12.0	3.1	88.9	13.5
	Total	943.0	254.4	48.6%	1,946.7

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The 943,000 Hispanics in the San Antonio ADI live in 254,400 households. Relative to its population, the vast majority of Hispanic households (192,800) are located in Bexar County.

III. MARKET PROFILE AND CHARACTERISTICS

An estimated 731,600 Hispanics currently live in the San Antonio Metro Area. What are the demographic characteristics of these residents? Are they young or old? How many are presently of Mexican and other Hispanic origins and descent? What are their educational levels and occupations? How many were born in this country? How many lived somewhere else prior to establishing residency in the San Antonio area?

This section of the Report presents the significant characteristics and profile of the present-day San Antonio Hispanic market.

A. COUNTRY OF ORIGIN -- HEAD OF HOUSEHOLD

Mexicans are currently the dominant nationality in the San Antonio Hispanic market, with 94.5% of the Hispanic heads of household being of Mexican origin or descent.

COUNTRY OF ORIGIN
HISPANIC HEAD OF HOUSEHOLD

	Percent
Mexico	94.5%
Spain	3.9
Central/South America	1.1
Other	0.5
TOTAL	100.0%

Source: Strategy Research Corporation

Following Mexicans distantly, households headed by persons from Spain represent the second largest percentage of San Antonio area Hispanics (3.9%).

Of the estimated 1988 San Antonio Metro Area Hispanic population of 731,600 persons, approximately 691,362 reside in households where the head of household is Mexican.

NUMBER OF PERSONS BY COUNTRY OF ORIGIN OF HISPANIC HEAD OF HOUSEHOLD SAN ANTONIO METRO AREA

Head Of Household Country Of Origin	Number Of Persons
Mexico	691,362
Spain	28,532
Central/South America	8,048
Other	3,658
TOTAL	731,600

Source: Strategy Research Corporation

Approximately 28,532 Spaniards live in the San Antonio area, while persons of other Hispanic origins numerate approximately 11,706.

B. RESIDENCY STATUS

The number of Hispanics who have entered the United States is impressive. But this number does not measure the potential for future immigration to the U.S. from Latin America (Mexico, the Caribbean, South and Central America). Neither the INS nor the Justice Department provide statistics which reflect the true magnitude of this potential.

The figures in the following table present an eloquent comparison between the projected growth of the Latin American population and that of the United States and Canada.

From parity with the U.S. and Canada in 1950, the Latin American population has grown, in 1985, to one and a half times the U.S./Canadian population (405 million, versus 264 million). In the year 2005, the Latin American population may be twice that of the U.S. and Canada.

POPULATION PRESSURE IN LATIN AMERICA

	Population Latin America	Population U.S./Canada
1950	165 Million	166 Million
1985	405 Million	264 Million
2005	780 Million	345 Million

Source: Population Reference Bureau, Washington, D.C.

The underlying causes for immigration from Latin America to the U.S. have been economic, social and political. These causes remain basically unchanged. The pace of future immigration is likely to reflect this process as well as the increasing population pressure.

The economic situation in Mexico continues to be dim, largely because of the enormous deficit the country is burdened with. The inflation rate in 1987 was roughly 140%.

In January 1988, the Mexican government issued the "Economic Solidarity Pact" with the expressed purpose of curtailing the skyrocketing inflation by having a price/wage freeze. When the price is eventually lifted, the economic situation will become more complex.

The minimum daily wage in Mexico is 8,000 pesos, or roughly $4.00 U.S. Many Mexicans look to the United States as the "Land of Opportunity" with aspirations of earning $4.00 an hour. Since many Mexicans only plan on working in the United States on a temporary basis and then returning to their homeland and living comfortably, the prospects of being deported is often not a concern to them.

Because Texas is contiguous with the country of Mexico, many aspiring Mexicans enter the State and start their new life of opportunity. If the economic situation continues to be dismal south of the border, the influx of Mexicans is seen as a relatively stable fact.

This section reveals several factors regarding San Antonio Hispanics' residency status -- both in the United States as well as in the San Antonio area. Strategy Research Corporation queried Hispanics with regard to their country of birth, the length of time the head of household has been living in the United States, and as well as in the San Antonio area.

1. Place Of Birth

San Antonio Hispanic heads of household, aged 18+, were asked whether they were born in the United States or some other country.

PLACE OF BIRTH

	Percent
Other Country	25.6%
U.S.A.	74.4
TOTAL	100.0%

Source: Strategy Research Corporation

Approximately three-fourths (74.4%) of San Antonio area Hispanics were born in the United States, while 25.6% of Hispanics were born outside the United States.

2. Length Of Residency In The United States

Surveyed Hispanics were asked to state the length of time the head of household has been living in the United States.

Two-thirds of Hispanic heads of household (66.4%) in the San Antonio area have been living in the United States for 30 years or longer. An additional 14.4% have lived in this country for 20-30 years.

LENGTH OF TIME
HEAD OF HOUSEHOLD
HAS BEEN LIVING IN UNITED STATES

	Percent
Less Than 1 Year	1.0%
1 - 3 Years	1.7
3 - 5 Years	4.4
5 - 7 Years	0.8
7 - 9 Years	1.4
9 - 11 Years	2.3
11 - 15 Years	3.1
15 - 20 Years	4.5
20 - 25 Years	7.1
25 - 30 Years	7.3
30 Years Or Longer	66.4
TOTAL	100.0%
Average Length Of Residency In U.S.A.	25 Years, 3 Months

Source: Strategy Research Corporation

A total of 7.1% of current San Antonio Hispanics have been in the United States for less than five years, with an additional 4.5% residing in this country 5-11 years.

The average length of residency in the United States among San Antonio Hispanics is 25 years, 3 months.

3. Length Of Residency In The San Antonio Area

In addition to being queried with regard to their length of residency in the United States, San Antonio Hispanics were asked to state how long the head of household had been living in the San Antonio area.

Overall, Hispanics in San Antonio are long-time residents of the area. Over half of Hispanic heads of household (56.0%) have been residing in the San Antonio area 30 years or longer, while 14.2% have resided in the area 20-30 years.

LENGTH OF TIME
HEAD OF HOUSEHOLD
HAS BEEN LIVING IN SAN ANTONIO AREA

	Percent
Less Than 1 Year	3.3%
1 - 3 Years	2.8
3 - 5 Years	5.4
5 - 7 Years	1.4
7 - 9 Years	3.6
9 - 11 Years	3.0
11 - 15 Years	4.9
15 - 20 Years	5.4
20 - 25 Years	6.6
25 - 30 Years	7.6
30 Years Or Longer	56.0
TOTAL	100.0%
Average Length Of Residency In San Antonio Area	22 Years, 11 Months

Source: Strategy Research Corporation

A total of 3.3% of current San Antonio residents are newcomers, as they have resided in the area for less than one year.

The average length of residency in the San Antonio area among Hispanic heads of household is approximately 22 years, 11 months.

C. HOUSEHOLD SIZE

1. Persons Per Household

Approximately one-fourth of the Hispanic households in the San Antonio area (25.6%) consist of one or two persons. A total of 18.4% are three-member households, while 19.4% are four-person households. Households with five or more members constitute more than one-third (36.6%) of the Hispanic households in the San Antonio area.

NUMBER OF PERSONS
PER HISPANIC HOUSEHOLD

	Percent
One	6.1%
Two	19.5
Three	18.4
Four	19.4
Five	16.7
Six	12.9
Seven	3.7
Eight Or More	3.3
TOTAL	100.0%
Average Number Of Persons Per Household	3.6

Source: Strategy Research Corporation

The average number of persons per Hispanic household in the San Antonio area is estimated at 3.6 persons.

2. Households By Size

In terms of absolute numbers, the San Antonio Metro Area contains approximately 51,533 Hispanic households with one or two members, and approximately 37,039 with three members.

SAN ANTONIO METRO AREA
HISPANIC HOUSEHOLDS BY SIZE

Household Size	Number Of Households
One	12,279
Two	39,254
Three	37,039
Four	39,052
Five Or More	73,676
TOTAL	201,300

Source: Strategy Research Corporation

In addition, there are approximately 39,052 Hispanic households in the San Antonio area with four members, and 73,676 households with five or more members.

D. AGE/SEX DISTRIBUTION

This is a relatively young market: approximately 41.4% of the San Antonio Hispanic market is under 18 years of age, while 27.6% are between the ages of 18 and 34.

SAN ANTONIO ADI
HISPANIC AGE/SEX DISTRIBUTION

	Hispanic Population (000)	Percent Distribution
Males 18-24	51.6%	5.5%
Males 25-34	73.6	7.8
Males 35-49	60.4	6.4
Males 50-54	15.2	1.6
Males 55-64	30.6	3.2
Males 65+	23.9	2.5
Males 18+	**255.3**	**27.1%**
Females 18-24	55.6	5.9%
Females 25-34	79.2	8.4
Females 35-49	73.7	7.8
Females 50-54	18.4	2.0
Females 55-64	36.8	3.9
Females 65+	33.2	3.5
Females 18+	**296.9**	**31.5%**
Teens (12 - 17)	**127.1**	**13.4**
Children (0 - 11)	**263.7**	**28.0**
TOTAL	**943.0**	**100.0%**

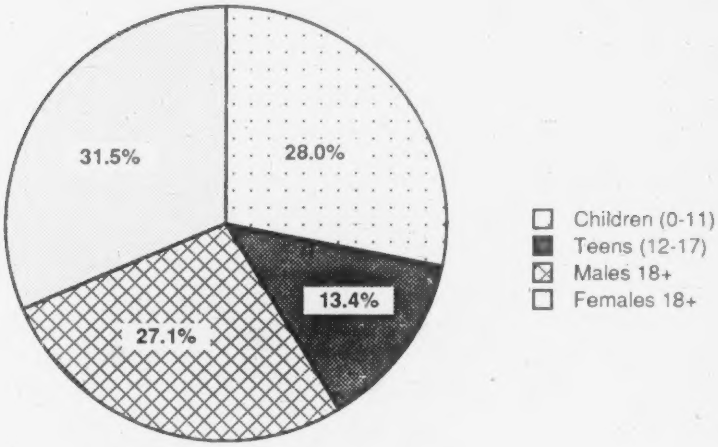
Average Age: 27.0

Source: Strategy Research Corporation

Adult males constitute 27.1% of the Hispanic population base, while adult females make up 31.5% of the population.

The average age of the San Antonio Hispanic market is 27.0 years, which is younger than that of their non-Hispanic counterparts.

AGE/SEX DISTRIBUTION



Average Age: 27.0 years

Source: Strategy Research Corporation

E. OCCUPATION -- HEAD OF HOUSEHOLD

Approximately one-fourth of Hispanic heads of household (23.4%) are employed in white collar jobs as professionals, managers, owners, or in technical, clerical or sales positions.

OCCUPATION
HEAD OF HOUSEHOLD

	Percent
White Collar	
Professional/Manager/ Owner/Technical/ Clerical/Sales	23.4%
Blue Collar	
Craftsmen/Operatives/ Service Workers/ Laborers/Farmers	50.0
Other	
Retired/Students/Military/ Disabled	19.7
Unemployed	6.9

Source: Strategy Research Corporation

One-half of Hispanics (50.0%) are also employed in blue collar jobs as craftsmen, operatives, service workers, laborers or farmers.

San Antonio's two major private employers are Levi Strauss and Datapoint Corporation. Together these two companies employ well over 3,000 people. It is also the major corporate headquarters of HEB Grocery Company (8,000+ employment) and United Services Automobile Association (7,000+ employment), as well as numerous others with employment of over 1,000-2,000 persons each. The Southwestern Bell major regional/division offices are also located in San Antonio (employment 4,000+).

A total of 19.7% of San Antonio Hispanics are retired/students/disabled or in the military. There are five military installations located in San Antonio: Fort Sam Houston (Army), Kelly AFB, Lackland AFB, Brooks AFB, and Randolph AFB.

Seven percent of Hispanics are currently unemployed, which is a level at par with those consistent over the past years.

F. FULL-TIME EMPLOYMENT

Presently, almost half of Hispanic households (46.9%) have one member employed on a full-time basis, while 23.7% have two members who are employed full-time. Eight percent of the Hispanic households are comprised of three or more family members who work on a full-time basis.

PERSONS EMPLOYED
FULL-TIME IN HOUSEHOLDS

	Percent
One Person	46.9%
Two Persons	23.7
Three Persons	5.6
Four Persons	2.3
Five Persons	0.2
No One Employed Full-Time	21.3
TOTAL	100.0%
Average Number Of Persons Employed Full-Time Per Household	1.2

Source: Strategy Research Corporation

Currently, there are an average of 1.2 persons employed full-time in San Antonio Hispanic households.

G. LEVEL OF EDUCATION -- HEAD OF HOUSEHOLD

All heads of household were asked about the last level of school completed.

Over one-third of Hispanic heads of household (38.3%) reached elementary or junior high school, and 42.9%, high school or *bachillerato*[1].

LEVEL OF EDUCATION
OF HEAD OF HOUSEHOLD

	Percent
Elementary/Junior High School	38.3%
High School/ Bachillerato	42.9
College	14.4
No Schooling	4.4
TOTAL	100.0%

Source: Strategy Research Corporation

As regards college education, 14.4% of Hispanics have completed some college or are college graduates.

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[1] A bachillerato differs from traditional domestic education in that it is a 5-year program.

H. HOUSEHOLD INCOME

The average annual household income in 1988 among San Antonio Hispanics is $20,600.

HOUSEHOLD INCOME
1988

	Hispanic
Mean Average Annual Income	$20,600

Source: Strategy Research Corporation

The next sub-section illustrates how this average household figure translates into an impressive level of spending power.

I. HISPANIC BUYING POWER

In the San Antonio Metro market, there are an estimated 201,300 households headed by Hispanics. Taking as a basis the mean average annual household income, the aggregate gross income is approximately $4.1 billion. The net income (reflecting buying power) is approximately $3.6 billion. This figure was adjusted to be comparable with Market Statistics Survey of Buying Power.

1988
HISPANIC BUYING POWER

San Antonio Metro	$3.6 billion
San Antonio ADI	$4.6 billion

Source: Strategy Research Corporation

When the contiguous 22 counties are added to the Metro Area, the buying power is increased to $4.6 billion.

With the continuing influx of Hispanics into the San Antonio area, the buying power of Hispanics as a group will increase. In addition, San Antonio Hispanics are, by and large, young people. Per capita earnings will thus tend to increase on a year-to-year basis, further reinforcing the buying power of the area's Hispanic community.

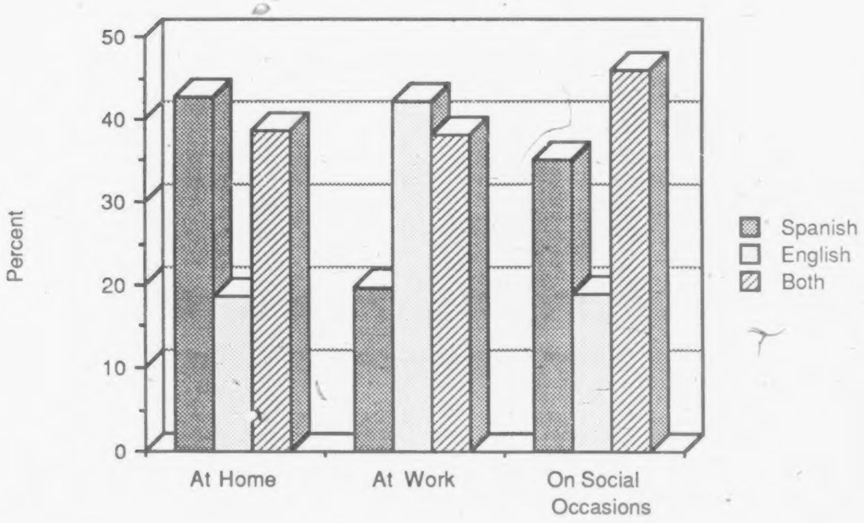
IV. LANGUAGE PATTERNS

Language represents a key factor in the acculturation and adaptation of arrivals to a new country. It is also inextricably woven into one's culture and traditions.

In order to provide meaningful insight into the patterns of language use in San Antonio, Hispanics were asked which language they speak most frequently at home, at work, and on social occasions.

To see if the San Antonio Hispanic market is responsive toward the need for language skills, respondents were also asked the degree of importance they placed on their children's ability to read and write Spanish and English fluently.

LANGUAGE SPOKEN MOST FREQUENTLY



Source: Strategy Research Corporation

A. LANGUAGE SPOKEN AT HOME, WORK, AND ON SOCIAL OCCASIONS

The following table is a summary of the language spoken most frequently by San Antonio Hispanics at various times.

Spanish is spoken most frequently by San Antonio Hispanics at home (42.6%) and on social occasions (35.1%). It is spoken to a lesser degree (19.8%) by Hispanics in the work environment.

LANGUAGE SPOKEN MOST FREQUENTLY BY SAN ANTONIO HISPANICS AT VARIOUS TIMES

Language Spoken	At Home	At Work	On Social Occasions
Spanish	42.6%	19.8%	35.1%
English	18.7	42.1	19.0
Both	38.7	38.1	45.9
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Even though the average length of residency of the San Antonio Hispanic community is close to 25 years, 43% speak Spanish while in the home. This represents approximately 86,559 households that make Spanish their primary language, while another 39% use both Spanish and English. Thus, the combined total of Spanish language usage among San Antonio Hispanics is 82%.

In the next sub-section, attitudes regarding language are explored.

B. ATTITUDES REGARDING LANGUAGE

In order to see if the San Antonio Hispanic market is responsive toward the need for language skills, respondents were asked the following two questions:

1. "How important is it to you that your children have the ability to read and write Spanish perfectly?"
2. "How important is it to you that your children have the ability to read and write English perfectly?"

The possible options were:

- Very Important
- Somewhat Important
- Neither Important Nor Unimportant
- Not Very Important
- Not At All Important

1. Spanish

A total of 83.1% of the Hispanics participating in the Study feel that it is "very important" for their children to read and write Spanish perfectly.

IMPORTANCE OF CHILDREN READING AND WRITING SPANISH PERFECTLY

	Percent
Very Important	83.7%
Somewhat Important	8.7
Neither Important Nor Unimportant	3.7
Not Very Important	2.0
Not Important At All	1.9
TOTAL	100.0%

Source: Strategy Research Corporation

An additional 8.7% of Hispanics also feel that it is "somewhat important" for their children to read and write Spanish with perfection. Thus, 91.8% of Hispanics feel that it is "very/somewhat important" to master the Spanish language.

2. English

Hispanics place a great deal of importance on their children mastering English language skills. A total of 97.9% of Hispanic respondents stated that it was "very/somewhat important" that their children be able to read and write English with a high degree of proficiency.

IMPORTANCE OF CHILDREN READING AND WRITING ENGLISH PERFECTLY

	Percent
Very Important	93.5%
Somewhat Important	4.4
Neither Important Nor Unimportant	0.9
Not Very Important	0.1
Not Important At All	1.1
TOTAL	100.0%

Source: Strategy Research Corporation

The following section will compare social attitudes among San Antonio Hispanics.

V. SOCIAL ATTITUDES

Having conducted numerous Hispanic market studies over a number of years, Strategy Research Corporation has been able to establish a series of scaled statements which provide a reliable measure of the attitudes of Hispanics to aspects of their culture.

Respondents are presented with a series of affirmations. They are asked to state the extent of their agreement with each affirmation, using a 5-point rating scale. The points on the scale are:

- Completely Agree
- Somewhat Agree
- Neither Agree Nor Disagree
- Somewhat Disagree
- Completely Disagree

The results of the scaled opinions are shown by "Completely Agree/Somewhat Agree" (Top Two Boxes) responses.

San Antonio Hispanics present an impressive image with regard to their family and culture. To an exceptional degree, Hispanics agreed emphatically with the affirmation, "It's Important To Get Together With Family Frequently On Social Occasions" (93.3%) and "I Am Proud To Be Hispanic And I Think Our Culture/Traditions Should Be Preserved And Kept" (89.5%).

The third most agreed upon statement concerns an interesting aspect of acculturation. Almost nine out of ten San Antonio Hispanics (87.2%) agreed with the statement, "I Think That It Is Important To Vote During Elections."

Another affirmation which emerged as a characteristic Hispanic trait was that expressed in the statement, "I Like To Listen To Latin Music," endorsed by 85.0% of the Hispanics interviewed.

RANKING OF SOCIAL ATTITUDES "COMPLETELY/SOMEWHAT AGREE"

	Percent
It's Important To Get Together With Family Frequently On Social Occasions	93.3%
I Am Proud To Be Hispanic And I Think Our Culture/Traditions Should Be Preserved And Kept	89.5
I Think That It Is Important To Vote During Elections	87.2

Continued. . .

RANKING OF SOCIAL ATTITUDES "COMPLETELY/SOMEWHAT AGREE" (CONTINUED)

	Percent
I Like To Listen To Latin Music	85.0%
It Is Important That My Family Speak Spanish At Home	79.3
The Popular Name Brands I Use Most Often Today Are Going To Be The Same Brands I Will Be Using Next Year	68.7
I Prefer Living In A Hispanic Neighborhood	66.4
Nationally Advertised And Popular Name Brands Are The Best Products For My Family	62.9
When I Go To A Store I Want The Salesperson To Understand Me In Spanish	58.0

Source: Strategy Research Corporation

Seventy-nine percent of all Hispanic adults interviewed also place importance on speaking the Spanish language at home, and two-thirds also prefer to live in a Hispanic neighborhood.

An aspect of shopping considered important by the majority of Hispanics was that of being attended to by Spanish-speaking salespeople. Fifty-eight percent agreed with the affirmation concerning this preference. Hispanics are much more comfortable when they can establish a personal relationship, even when making a purchase.

Hispanics also prefer name brand merchandise. A total of 62.9% of Hispanics concur in the preference for popular, nationally-advertised brands for themselves and their families, while 68.7% indicate a strong sense of brand loyalty in that they plan on using the same brands tomorrow as they are using today.

These findings have relevance in two areas. First, they show that the majority of Hispanics in the San Antonio area clearly manifest and reaffirm their identity as a Hispanic community. Second, as can be seen with time and influence, San Antonio Hispanics have developed a bi-cultural personality.

VI. SHOPPING PATTERNS

San Antonio Hispanics were asked to indicate which types of food stores they patronize, the one which they shop at most frequently, and specifically, to cite the name of that particular store. Average weekly food store expenditures were also measured.

The incidence of department store patronage was determined, as well as the various retail outlets shopped for seven select products ranging from clothing and jewelry to furniture and household appliances.

Respondents were also queried regarding their three favorite shopping malls, and to state the one at which they most recently shopped.

The accompaniment of others when shopping was also a point of query.

A. FOOD STORE PATRONAGE

1. Types Of Stores Patronized

Survey participants were initially asked by the interviewer, "I am going to read you a list of some different types of food stores. For each one that I mention, I would like you to tell me if you ever use it to buy grocery items."

Virtually all Hispanics in San Antonio patronize large chain supermarkets (98.9%).

FOOD STORES PATRONIZED

	Chain Supermarket	Convenience Store	Neighborhood Store
Yes	98.9%	52.6%	32.6%
No	1.1	47.4	67.4
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

More than one-half of San Antonio Hispanics (52.6%) patronize convenience stores, and almost one-third (32.6%) also patronize neighborhood stores.

2. Primary Store

After obtaining the incidence of patronage for the three types of food outlets, respondents were asked to indicate the one which they shop at most frequently.

Hispanics in San Antonio primarily shop at the larger chain supermarkets (94.7%).

TYPE OF FOOD STORE PATRONIZED MOST FREQUENTLY

	Percent
Chain Supermarket	94.7%
Convenience Store	3.3
Neighborhood Store	2.0
TOTAL	100.0%

Source: Strategy Research Corporation

Convenience stores are the primary store for 3.1% of the Hispanics interviewed, while 2.2% usually shop in one or more of their neighborhood stores.

3. Food Store Patronized Most Frequently

The most frequented food store among Hispanics is HEB. Almost one-half (48.4%) of all San Antonio Hispanics patronize HEB most often.

Following HEB is Handy Andy with mentions of 26.8%.

FOOD STORE PATRONIZED MOST OFTEN

	Percent
HEB	48.4%
Handy Andy	26.8
Kroger	12.5
Warehouse Grocery	3.7
La Fiesta	2.5
Centeno	1.8
Albertson's	1.7
Ben Rodriguez	0.5
Other	2.1
TOTAL	100.0%

Source: Strategy Research Corporation

Kroger, with mentions by 12.5%, is the third most frequented food store, followed by Warehouse Grocery which was named by 3.7%.

4. Weekly Food Store Expenditures

All respondents were asked approximately how much they spent weekly on purchases made for the whole family in all the different types of food stores.

AVERAGE WEEKLY
FOOD STORE EXPENDITURES

	Hispanic Households
1988	$90.87

Source: Strategy Research Corporation

The average weekly expenditure for Hispanic households at all food stores is currently $90.87.

B. DEPARTMENT STORE PATRONAGE

All Hispanics participating in the survey were asked, "In a typical month, not including recent holiday shopping, do you ever buy any type of merchandise in a department store?"

DEPARTMENT STORE PATRONAGE

	Percent
Yes	84.2%
No	15.8
TOTAL	100.0%

Source: Strategy Research Corporation

- Eighty-four percent of Hispanics shop regularly at one of San Antonio's department stores, be it Sears, JC Penney, Dillards, Foley's, Frost Bros., Mervyn's, Montgomery Wards, etc.

C. RETAIL OUTLETS SHOPPED FOR SELECT PRODUCTS

This section of the Report analyzes the various different types of stores shopped for select household and personal items. Do Hispanics patronize one type of store over another for certain items? The products under survey included:

- Jewelry
- Furniture
- Toys
- Electronics (TV, radio, stereo, etc.)
- Shoes
- Household Appliances
- Clothing

Hispanics were asked where they usually purchase each of these products. Do they usually patronize a. . .

- Specialty Store (store specializing in that product line)
- Department Store (Sears, JC Penney, Dillards, etc.)
- Discount Store (Target, Walmart, K-Mart, etc.)
- Catalog Showroom
- Other Retail Outlet

1. Jewelry

A total of 68.7% of San Antonio Hispanics purchase jewelry. The most common place of purchase for jewelry is a jewelry store (28.5%), followed closely by department stores (21.9%).

TYPE OF STORE
WHERE JEWELRY IS PURCHASED

	Percent
Specialty Store/Jewelry Store	28.5%
Department Store	21.9
Discount Store	14.4
Catalog Showroom	1.3
Other	2.6
None/Do Not Buy Jewelry	31.3
TOTAL	100.0%

Source: Strategy Research Corporation

Approximately 14% of all jewelry purchases are made at discount stores. Catalog showrooms account for only 1.3% of jewelry purchases made by Hispanics.

2. Furniture

When San Antonio Hispanics buy furniture, they usually go to a furniture store. More than one-third of Hispanics (35.6%) purchase from furniture showrooms.

TYPE OF STORE
WHERE FURNITURE IS PURCHASED

	Percent
Specialty Store/Furniture	35.6%
Department Store	28.9
Discount Store	16.8
Catalog Showroom	0.8
Other	3.2
None/Do Not Buy	14.3
TOTAL	100.0%

Source: Strategy Research Corporation

Next to furniture stores, Hispanics will patronize department stores (28.9%), followed by discount stores (16.8%).

3. Toys

Almost one-third of San Antonio Hispanics (32.4%) purchase toys at discount stores. Department stores, with mentions by 23.5%, rank second.

TYPE OF STORE
WHERE TOYS ARE PURCHASED

	Percent
Discount Store	32.4%
Department Store	23.5
Specialty Store/Toy Store	15.3
Catalog Showroom	1.0
Other	1.0
None/Do Not Buy	26.8
TOTAL	100.0%

Source: Strategy Research Corporation

Specialty shops/toy stores are visited by 15.3% of Hispanics.

In total, approximately 75% of all San Antonio Hispanic adults buy toys.

4. Electronics

Respondents were asked to name the type of store they usually shop for electronic audio and visual equipment such as televisions, stereos, radios, etc.

Department stores are twice as popular than most other types of stores. Specifically, 42.2% of Hispanics would look to a department store for electronic goods, while 23.6% would turn to a discount store, and 18.5% would shop for electronics at an electronics specialty store.

TYPE OF STORE
WHERE ELECTRONICS ARE PURCHASED

	Percent
Department Store	42.2%
Discount Store	23.6
Specialty Store/Electronics	18.5
Catalog Showroom	1.1
Other	2.9
None/Do Not Buy	11.1
TOTAL	100.0%

Source: Strategy Research Corporation

Overall, only 11.1% of San Antonio Hispanics indicated that they do not purchase electronics -- thus, 88.9% of the population represents a possible electronic goods market.

5. Shoes

For the most part, shoes are purchased most often in shoe stores such as Kinney Shoes, Thom McAn, etc. More than one-third of San Antonio Hispanics (38.0%) are apt to patronize a shoe store than another type of retail location.

TYPE OF STORE
WHERE SHOES ARE PURCHASED

	Percent
Specialty Store/Shoe Store	38.0%
Discount Store	30.2
Department Store	30.0
Other	1.8
TOTAL	100.0%

Source: Strategy Research Corporation

Department stores, along with discount stores, are the second ranked source of shoe purchases; discount stores were mentioned by 30.2% and department stores by 30.0%.

6. Household Appliances

Department stores are frequented by almost half of all Hispanics when household appliances are required. That is, 45.4% of San Antonio's Hispanic residents will shop a department store when in need of a new refrigerator, stove, washing machine/dryer, etc.

TYPE OF STORE WHERE HOUSEHOLD APPLIANCES ARE PURCHASED

	Percent
Department Store	45.4%
Discount Store	23.5
Specialty Store/Appliances	12.5
Other	2.6
None/Do Not Buy	16.0
TOTAL	100.0%

Source: Strategy Research Corporation

Almost one-fourth of Hispanics will also shop for major white goods in a discount store, while appliance stores are shopped at by 12.5%.

7. Clothing

Department stores are the favorite place to shop for clothes. More than half of San Antonio Hispanic adults (54.9%) will patronize an area department store for clothing.

TYPE OF STORE WHERE CLOTHING IS PURCHASED

	Percent
Department Store	54.9%
Discount Store	35.8
Specialty Store/Clothes Store	4.6
Other	3.2
None/Do Not Buy	1.5
TOTAL	100.0%

Source: Strategy Research Corporation

Discount stores are the second most popular source of clothing purchases (35.8%), while boutiques/specialty clothing stores are visited by 4.6% of San Antonio Hispanic adults.

D. SHOPPING MALLS

Which are the favored shopping malls among San Antonio Hispanics? And which one in particular do they shop at most frequently?

1. Favorite Shopping Malls

All survey participants were asked to name their favorite shopping malls -- up to three mall names were accepted per respondent.

Overall, Ingram Park is the favorite mall among San Antonio Hispanics. Ingram Park received total mentions of 46.8%.

Following second is South Park -- this is the favorite mall of 37.9% of San Antonio's Hispanic adults.

FAVORITE SHOPPING MALLS

	Percent
Ingram Park	46.8%
South Park	37.9
North Star	34.8
Wonderland (Crossroads)	28.6
Mc Creless	22.9
Windsor Park	16.0
Central Park	15.6
Las Palmas	14.6
Westlakes Mercado	7.2
Other	3.8
TOTAL	*

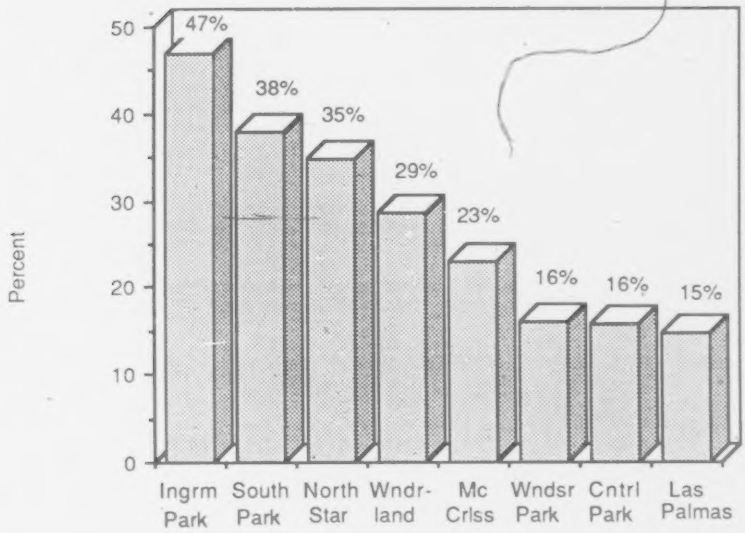
* Multiple Response

Source: Strategy Research Corporation

North Star, with mentions by 34.8%, ranks third in terms of popularity.

Wonderland (Crossroads) ranks fourth (28.6%), followed by Mc Creless (22.9%).

FAVORITE SHOPPING MALLS



Source: Strategy Research Corporation

2. Most Recently Patronized Mall

In addition to naming their three favorite malls, Hispanics were also asked to name the one shopping mall which they most recently patronized.

South Park, with mentions of 23.7% and Ingram Park, with mentions of 20.1%, are the two most recently shopped malls among Hispanic adults.

SHOPPING MALL
MOST RECENTLY PATRONIZED

	Percent
South Park	23.7%
Ingram Park	20.1
Wonderland (Crossroads)	14.4
North Star	12.5
Mc Creless	9.8
Las Palmas	9.7
Central Park	5.0
Windsor Park	2.7
Westlakes Mercado	0.9
Other	1.2
TOTAL	100.0%

Source: Strategy Research Corporation

Wonderland (Crossroads) and North Star rank third and fourth in terms of patronage (14.4% and 12.5%, respectively).

E. ACCOMPANIMENT OF OTHERS

All survey participants were asked, "When you go shopping, how many people usually go with you?"

SHOPPING
ACCOMPANIMENT OF OTHER PERSONS

	Percent
Shop Alone/No One Else	20.9%
One Person	16.2
Two Persons	40.5
Three Persons	11.2
Four Persons	6.1
More Than Four Persons	5.1
TOTAL	100.0%
Average Accompaniment	2.3 persons

Source: Strategy Research Corporation

Hispanics are very inclined to go shopping accompanied by other family members/friends. A total of 16.2% stated that they usually shop with one other person, while 40.5% of the Hispanics interviewed said that they usually go shopping with two more people. An additional 22.4% are accompanied by three or more persons.

Overall, San Antonio Hispanic adults are usually accompanied by approximately 2.3 other persons.

VII. FAST FOOD RESTAURANT PATRONAGE

This section of the Report presents data with regard to the patronage by Hispanics of three popular types of fast food restaurants:

- Hamburger
- Chicken
- Pizza

For each type of fast food restaurant, the respondent was asked, "How often do you or any member of your family eat at or buy food to take out at a fast food hamburger/chicken/pizza restaurant?"

Overall, San Antonio Hispanics are, by and large, heavy consumers of fast food. In fact, perhaps due in part to their acculturation, they frequent hamburger and chicken fast food restaurants almost twice as often as Hispanics in other areas of the country.

1. Hamburger Fast Food Restaurants

A total of 84.2% of San Antonio Hispanics stated that fast food hamburger restaurants such as McDonald's and Burger King are patronized by family members.

On average, Hispanics visit fast food hamburger restaurants, either to eat at or take food from, 4.4 times per month.

FREQUENCY OF PATRONAGE
FAST FOOD HAMBURGER RESTAURANTS

	Percent
More Than Once A Week	19.2%
Once A Week	29.0
Three Times A Month	5.8
Twice A Month	11.5
Once A Month	14.2
Less Than Once A Month	4.5
Never	15.8
TOTAL	100.0%
Average Number Of Times Per Month	4.4

Source: Strategy Research Corporation

Of all Hispanics interviewed, almost one-half (48.2%) eat at fast food hamburger restaurants at least once a week.

2. Chicken Fast Food Restaurants

The incidence of eating at or taking food from a fast food chicken restaurant registers at almost the same level as that of fast food hamburger restaurants. That is, 83.2% of San Antonio Hispanics patronize chicken fast food restaurants such as Kentucky Fried Chicken.

In an average month, San Antonio area Hispanics visit fast food chicken restaurants approximately 4.2 times.

FREQUENCY OF PATRONAGE
FAST FOOD CHICKEN RESTAURANTS

	Percent
More Than Once A Week	17.8%
Once A Week	26.0
Three Times A Month	8.5
Twice A Month	12.0
Once A Month	15.1
Less Than Once A Month	3.8
Never	16.8
TOTAL	100.0%
Average Number Of Times Per Month	4.2

Source: Strategy Research Corporation

Chicken fast food restaurants are frequented more than once a week by 17.8% of Hispanics. An additional 26.0% of Hispanics frequent chicken type fast food restaurants once a week. Thus, heavy patronage (at least once a week) among San Antonio Hispanics registers at 43.8%.

3. Pizza Fast Food Restaurants

On average, San Antonio Hispanics patronize fast food pizza restaurants approximately 2.3 times per month.

FREQUENCY OF PATRONAGE
FAST FOOD PIZZA RESTAURANTS

	Percent
More Than Once A Week	8.0%
Once A Week	14.5
Three Times A Month	6.5
Twice A Month	9.5
Once A Month	18.2
Less Than Once A Month	8.5
Never	34.8
TOTAL	100.0%
Average Number Of Times Per Month	2.3

Source: Strategy Research Corporation

Fast food pizza restaurants are patronized weekly or more often by 22.5% of Hispanics.

VIII. PRODUCT USAGE

All survey respondents were asked about their purchases of food products, including pasta, cereal, snack foods, candies, carbonated soft drinks, and beer. They were also queried regarding their use of such non-food items as cosmetics and eyeglasses.

This section of the Report presents these product usage characteristics among San Antonio households as well as their frequency of use.

A. INCIDENCE OF CONSUMPTION/USE

The following table shows the incidence of use among San Antonio Hispanics for eight various products, and indicates that all of these products are used by the majority of Hispanic households in the area.

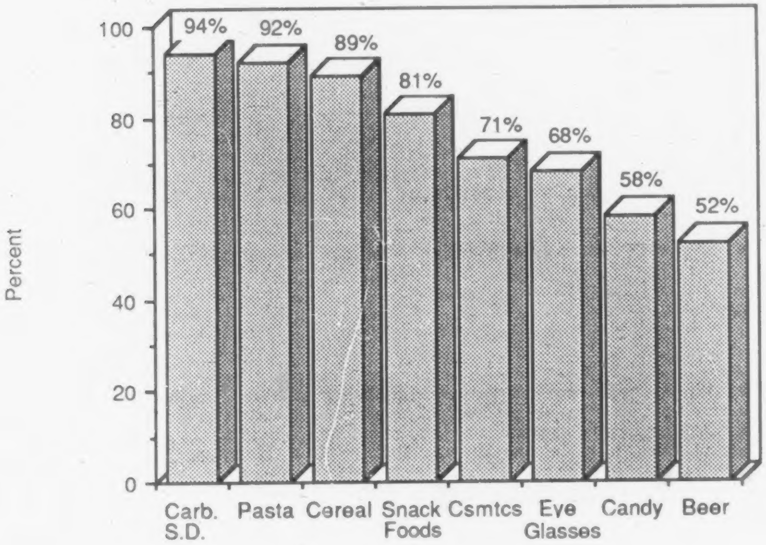
Carbonated soft drinks are consumed by at least one family member in more than nine out of ten Hispanic households in San Antonio. Likewise, more than nine out of ten Hispanic households use pasta such as spaghetti, noodles or macaroni.

Cereal is also a widely used food product among Hispanics as consumption nears the 90% level.

INCIDENCE OF HOUSEHOLD CONSUMPTION/USE
SELECTED PRODUCTS

	Percent
Carbonated Soft Drinks	94.3%
Pasta	91.8
Cereal	88.7
Snack Foods	81.1
Cosmetics	70.8
Eyeglasses	67.7
Candy	57.9
Beer	52.4

INCIDENCE OF HOUSEHOLD CONSUMPTION/USE



Source: Strategy Research Corporation

B. FREQUENCY OF PURCHASE

The following table shows how many times per month a particular product is used/consumed by Hispanic households in the San Antonio market area.

For example, of the San Antonio area Hispanic households that drink carbonated soft drinks, we see the product category being purchased approximately five times per month, or 1.25 times a week.

Beer is also purchased slightly more often than once a week (4.5 times per month).

AVERAGE FREQUENCY OF HOUSEHOLD PURCHASE
(MONTHLY BASIS)
SELECTED PRODUCTS

	Number Of Times Per Month
Carbonated Soft Drinks	5.0
Pasta	3.6
Cereal	3.6
Snack Foods	4.0
Cosmetics	3.3
Candy	3.5
Beer	4.5

Overall, purchase of these select products is high as they are brought home approximately once per week.

C. SNACK FOODS

1. Incidence Of Consumption

All survey participants were asked, "Do you or any other member of this household ever buy snack foods such as crackers, pretzels, or potato chips for consumption in this household?"

A total of 81.1% of all Hispanics interviewed in the San Antonio area stated that snack foods are consumed by household members.

INCIDENCE OF HOME CONSUMPTION
SNACK FOODS

	Percent
Yes	81.1%
No	18.9
TOTAL	100.0%

Source: Strategy Research Corporation

Thus, four out of five Hispanic households purchase snack foods for home consumption.

2. Frequency Of Purchase

All respondents who indicated household consumption of snack foods were asked how often these products were purchased.

Not only is the incidence of consumption for snack foods high, so is the frequency of purchase. These products are purchased an average of four times per month, or, once a week.

The majority (69.8%) of snack food purchases are made at least once a week. Specifically, 52.1% of Hispanic households purchase snack foods approximately once a week, with an additional 17.7% purchasing snack foods for home consumption more than once a week.

FREQUENCY OF PURCHASE
SNACK FOODS

	Percent
More Than Once A Week	17.7%
Once A Week	52.1
Three Times A Month	5.4
Twice A Month	11.7
Once A Month	11.3
Every 1 - 2 Months	1.1
Every 2 - 3 Months	0.4
Every 4 - 6 Months	0.2
Less Than Once Every 6 Months	0.1
TOTAL	100.0%
Average Number Of Times Per Month	4.0

Source: Strategy Research Corporation

A total of 28.4% of Hispanics also purchase snack foods one to three times per month; less frequent consumers accounted for only 1.8% of the Hispanic households.

D. PASTA

1. Incidence Of Consumption

Pasta is a very popular food staple among San Antonio Hispanics. When asked, "Is pasta such as macaroni, noodles or spaghetti ever purchased for consumption in this household?" a total of 91.8% of Hispanics replied in the affirmative.

Hispanics consume a lot of pasta thru *fideos* in either *sopa aguada* or *sopa seca*.

Another popular dish is *ensalada de codos* (literally - elbow salad). This is a cold dish salad pasta plate that is consumed with quite some frequency.

INCIDENCE OF HOME CONSUMPTION
PASTA

	Percent
Yes	91.8%
No	8.2
TOTAL	100.0%

Source: Strategy Research Corporation

2. Frequency Of Purchase

In line with consumption, the purchase of pasta is also very frequent. A total of 10.5% of Hispanic households purchase pasta products more than once a week; an additional 51.4% purchase pasta once a week on average.

Overall, pasta is purchased approximately 3.6 times per month.

FREQUENCY OF PURCHASE
PASTA

	Percent
More Than Once A Week	10.5%
Once A Week	51.4
Three Times A Month	8.0
Twice A Month	14.0
Once A Month	14.5
Every 1 - 2 Months	1.3
Every 2 - 3 Months	0.1
Every 4 - 6 Months	0.2
Less Than Once Every 6 Months	0.0
TOTAL	100.0%
Average Number Of Times Per Month	

Source: Strategy Research Corporation

More than one-third of Hispanic households in the San Antonio area (36.5%) buy uncooked pasta anywhere from one to three times a month.

E. BEER

1. Incidence Of Consumption

Respondents were asked, "Do you or any other household member ever buy beer for consumption in this household?"

INCIDENCE OF HOME CONSUMPTION
BEER

	Percent
Yes	52.4%
No	47.6
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 52.4% of all Hispanics interviewed in the San Antonio area indicated that beer is consumed at home by someone in their household. This is a level at par with other Hispanic areas in the Southwest.

2. Frequency Of Purchase

In general, beer is purchased about 4.5 times per month by Hispanic households. The average number of purchases per week equates to 1.1.

Almost three out of ten Hispanics (29.2%) purchase beer for home consumption more than once a week. A total of 39.9% purchase this alcoholic beverage approximately once a week.

FREQUENCY OF PURCHASE
BEER

	Percent
More Than Once A Week	29.2%
Once A Week	39.9
Three Times A Month	5.4
Twice A Month	10.6
Once A Month	11.3
Every 1 - 2 Months	1.0
Every 2 - 3 Months	0.8
Every 4 - 6 Months	0.8
Less Than Once Every 6 Months	1.0
TOTAL	100.0%
Average Number Of Times Per Month	4.5

Source: Strategy Research Corporation

Twenty-seven percent of all beer-drinking Hispanic households purchase the beverage one to three times a month.

3. Place Of Purchase

Beer-consuming households were also asked, "In what type of store is the beer that is purchased for consumption in this house usually bought?"

In the San Antonio market, three-fourths of beer purchases are made in chain supermarkets.

TYPE OF STORE
WHERE BEER IS USUALLY PURCHASED

	Percent
Chain Supermarket	75.5%
Convenience Store	17.0
Neighborhood Store	5.1
Liquor Store	1.8
Other	0.6
TOTAL	100.0%

Source: Strategy Research Corporation

Convenience stores are the second most popular purchase outlets among San Antonio Hispanics (17.0%).

F. CARBONATED SOFT DRINKS

1. Incidence Of Consumption

Carbonated soft drinks are very popular among San Antonio Hispanics, as the product category is consumed by more than nine out of every ten households (94.3%). In fact, this level of consumption exceeds that recorded among Hispanics in other major U.S. cities.

INCIDENCE OF HOME CONSUMPTION
CARBONATED SOFT DRINKS

	Percent
Yes	94.3%
No	5.7
TOTAL	100.0%
Base	808

Source: Strategy Research Corporation

Only 5.7% of Hispanic households do not purchase carbonated soft drinks for home consumption.

2. Frequency Of Purchase

All respondents who indicated the household purchase of carbonated soft drinks were asked, "How often are carbonated soft drinks purchased for consumption in this house by you or any other household member?"

In reply, over one-third of Hispanics (35.0%) stated that carbonated soft drinks are purchased for home consumption more than once a week. In addition, 44.5% of Hispanic households include carbonated soft drinks along with their weekly grocery purchases.

FREQUENCY OF PURCHASE
CARBONATED SOFT DRINKS

	Percent
More Than Once A Week	35.0%
Once A Week	44.5
Three Times A Month	6.5
Twice A Month	7.3
Once A Month	6.1
Every 1 - 2 Months	0.4
Every 2 - 3 Months	0.1
Every 4 - 6 Months	0.1
Less Than Once Every 6 Months	0.0
TOTAL	100.0%
Average Number Of Times Per Month	5.0

Source: Strategy Research Corporation

A total of 6.5% of Hispanic households make carbonated soft drink purchases approximately three times a month, while 13.4% purchase carbonated soft drinks from one to two times per month.

In general, carbonated soft drinks are purchased for home consumption approximately 5.0 times per month.

3. Place Of Purchase

Large supermarket chains account for the vast majority (85.1%) of carbonated soft drink purchases.

TYPE OF STORE
WHERE CARBONATED SOFT DRINKS ARE USUALLY PURCHASED

	Percent
Chain Supermarket	85.1%
Convenience Store	8.7
Neighborhood Store	5.2
Liquor Store	0.3
Other	0.7
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 8.7% of Hispanics usually purchase carbonated soft drinks at convenience stores, while 5.2% purchase carbonated soft drinks in smaller stores located in their neighborhood.

G. CANDY

1. Incidence Of Consumption

Do San Antonio Hispanics ever buy candy for consumption in the home? Over half (57.9%) indicated "yes."

INCIDENCE OF HOME CONSUMPTION
CANDY

	Percent
Yes	57.9%
No	42.1
TOTAL	100.0%

Source: Strategy Research Corporation

Candy consumption among the San Antonio Hispanic community is, for the most part, higher than in other markets in the Southeast U.S; nonetheless, it is at par with those located in the Northeast as well as with other Texas markets.

2. Frequency Of Purchase

Half (50.6%) of the San Antonio Hispanics that purchase candy for consumption in the home do so at least once a week.

A total of 8.7% of the user households purchase candy approximately three times a month, and 12.8% of the households purchase candy about every two weeks.

Once a month purchases account for 21.1% of the Hispanic households.

FREQUENCY OF PURCHASE CANDY

	Percent
More Than Once A Week	18.6%
Once A Week	32.0
Three Times A Month	8.7
Twice A Month	12.8
Once A Month	21.1
Every 1 - 2 Months	2.4
Every 2 - 3 Months	1.2
Every 4 - 6 Months	1.2
Less Than Once Every 6 Months	2.0
TOTAL	100.0%
Average Number Of Times Per Month	3.5

Source: Strategy Research Corporation

In general, candy is purchased for consumption in the home approximately 3.5 times per month.

3. Type Of Candy Purchased Most Often

What type of candy do San Antonio Hispanics purchase most often for themselves or to serve to guests?

By far, the most popular candy is chocolate. Chocolates were mentioned by the majority (54.5%) of responding Hispanics. Hard candies, with responses of 16.5%, were the second most mentioned type of candy for consumption in the home.

TYPE OF CANDY
PURCHASED MOST OFTEN
FOR CONSUMPTION IN THE HOME

	Percent
Chocolate	54.5%
Hard Candy	16.5
Candy Bar	14.0
Gum	12.7
All Types	1.3
Other	1.0
TOTAL	100.0%

Source: Strategy Research Corporation

Candy bars and chewing gum received relatively the same percentage of mentions. A total of 14.0% of the Hispanic households usually purchase candy bars for home consumption, while 12.7% usually purchase chewing gum. Both of these types of sweets may be purchased individually or in "family packs."

H. CEREAL

1. Incidence Of Consumption

Cereal is consumed in a substantially large proportion of San Antonio Hispanic households. This is the case also with other U.S. Hispanics - most times due to their larger and younger family size.

Specifically, 88.7% of the Hispanics interviewed stated that someone in their household eats cereal, either the hot or cold type.

INCIDENCE OF HOME CONSUMPTION
CEREAL

	Percent
Yes	88.7%
No	11.3
TOTAL	100.0%

Source: Strategy Research Corporation

Respondents indicating consumption were further queried with regard to frequency of purchase.

2. Frequency Of Purchase

Six out of ten Hispanic homes (60.3%) that buy cereal do so once a week or more often.

Eighteen percent of the Hispanic households make cereal a part of their shopping list approximately once a month, while 12.9% purchase the product category about every two weeks.

FREQUENCY OF PURCHASE CEREAL

	Percent
More Than Once A Week	12.4%
Once A Week	47.9
Three Times A Month	8.0
Twice A Month	12.9
Once A Month	17.9
Every 1 - 2 Months	0.5
Every 2 - 3 Months	0.3
Every 4 - 6 Months	0.0
Less Than Once Every 6 Months	0.1
TOTAL	100.0%
Average Number Of Times Per Month	3.6

Source: Strategy Research Corporation

In general, cereal is purchased approximately 3.6 times per month.

3. Type Of Cereal Preferred

Respondents from cereal-consuming households were also asked, "What type of cereal do you and your family prefer?"

Dry (cold) cereal is, by far, the most liked type of cereal among Hispanics. Within this category, both the sweetened and unsweetened variety hold an equal degree of preference (59.5% and 60.6%, respectively).

TYPE OF CEREAL PREFERRED

	Sweetened	Unsweetened
Dry Cereal	59.5%	60.6%
Hot Cereal	9.4	10.1
Both	31.1	29.3
TOTAL	100.0%	100.0%
Base	478	239

Source: Strategy Research Corporation

Unsweetened hot cereal, with mentions of 10.1%, is also just about as popular as sweetened hot cereal (9.4%).

Nevertheless, three out of ten Hispanic households indicate a preference for both dry as well as hot cereal.

I. COSMETICS

1. Incidence Of Use

All women participating in the survey were asked if they ever used cosmetics such as eye shadow, mascara, blush, lipstick, etc.

A total of 70.8% of Hispanic women in San Antonio who are 18 years of age and older use at least one type of cosmetic.

INCIDENCE OF USE
AMONG HISPANIC WOMEN 18+
COSMETICS

	Percent
Yes	70.8%
No	29.2
TOTAL	100.0%

Source: Strategy Research Corporation

2. Frequency Of Purchase

The frequency of purchasing cosmetics is an oft-time thing. More than one-third (34.6%) of cosmetic purchases are made more than once a week. An additional 10.6% of Hispanic women purchase cosmetics on the average of about once a week.

FREQUENCY OF PURCHASE
COSMETICS

	Percent
More Than Once A Week	34.6%
Once A Week	10.6
Three Times A Month	3.3
Twice A Month	7.3
Once A Month	19.4
Every 1 - 2 Months	5.1
Every 2 - 3 Months	6.8
Every 4 - 6 Months	4.4
Less Than Once Every 6 Months	8.5
TOTAL	100.0%
Average Number Of Times Per Month	3.3

Source: Strategy Research Corporation

Nineteen percent of Hispanic women purchase cosmetics once a month, while 7.3% purchase cosmetics twice a month, and 3.3% purchase them on the average of three times a month.

In general, cosmetic purchases are made by adult women approximately 3.3 times in a typical month.

3. Place Of Purchase

Where do Hispanic women in San Antonio purchase their cosmetics? Do they shop at discount stores such as K-Mart or Target, or larger department stores such as Dillards, Sears, or JC Penney? How many purchases are made in drug stores and supermarkets?

Survey findings reveal that San Antonio Hispanic women have a preference for discount stores, department stores, and supermarkets.

Ranking them first place, with mentions of 29.0%, discount stores edged over supermarkets (25.8%) and department stores (23.6%).

TYPE OF STORE
WHERE COSMETICS ARE USUALLY PURCHASED

	Percent
Discount Store	29.0%
Supermarket	25.8
Department Store	23.6
Door-To-Door Sales	9.8
Drug Store	8.8
Mail Order	1.2
Other	1.8
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 8.8% of San Antonio women usually purchase cosmetics at drug stores.

Ten percent of the women who use lipstick, mascara, blush, etc., purchase their cosmetics via door-to-door sales (such as Avon and Mary Kay).

J. EYEGLASSES

All respondents were asked how many members of their household wear eyeglasses, as well as where eyeglasses are usually purchased.

1. Incidence Of Use

Close to seven out of ten San Antonio Hispanics wear eyeglasses.

In one-third of all Hispanic households (33.1%), there is one family member present who wears eyeglasses. In almost one-fourth of the households (22.9%), there are two members who wear eyeglasses.

NUMBER OF HOUSEHOLD MEMBERS WHO WEAR EYEGLASSES

	Percent
One	33.1%
Two	22.9
Three	8.5
Four	2.1
More Than Four	1.1
None	32.3
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 11.7% of all Hispanics interviewed stated that there were three or more members in their household who wore eyeglasses.

2. Place Of Purchase

When San Antonio Hispanics need to purchase eyeglasses, nine times out of ten, they will frequent an optician/optical store (88.1%).

TYPE OF STORE
WHERE EYEGLASSES ARE PURCHASED

	Percent
Optician/Optical Store	88.1%
Department Store	8.4
Other	3.5
TOTAL	100.0%

Source: Strategy Research Corporation

Department stores are the retail outlet for 8.4% of Hispanics.

In the next section of this Report, ownership patterns are explored.

IX. OWNERSHIP PATTERNS

This section of the Report presents data with regard to Hispanic ownership of various types of consumer goods and services. Specifically, the survey sample was queried regarding home ownership, ownership of automobiles and other types of vehicles, telephone ownership, and the ownership of various types of credit cards.

A. HOME OWNERSHIP

Buying a home is a very important financial decision among most families. Home ownership, however, has a significance beyond the simple acquisition of property: the decision to buy a home signifies putting down roots, establishing the family in a chosen area, and becoming part of a community.

Respondents were asked about their present and future arrangements for home ownership.

1. Incidence Of Home Ownership

More than two-thirds of Hispanics (68.7%) own their own homes.

HOME OWNERSHIP
AMONG HISPANICS

	Percent
Own	68.7%
Rent	31.3
TOTAL	100.0%

Source: Strategy Research Corporation

2. Intention To Buy A Home Within The Next Year

Of those who currently rent, almost one-third (29.6%) plan to buy within the next 12 months, compared to 5.2% of those who currently own their home, and intend to buy a different home.

INTENT TO PURCHASE A HOME
WITHIN THE NEXT YEAR

	Currently Rent	Currently Own
Yes	29.6%	5.2%
No	70.4	94.8
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Thus, intent to purchase is relatively strong, especially among those who currently rent.

3. Intent To Purchase By Type Of Home

Intending home buyers were queried as to the type of home they planned to buy.

The main preference among San Antonio Hispanics is for a single family home; 94.3% of Hispanics plan to buy this type of residence within the upcoming year.

PLAN TO BUY A HOME
BY TYPE
AMONG HISPANICS

	Percent
House	94.3%
Condominium	2.5
Townhouse	2.4
Duplex	0.8
TOTAL	100.0%

Source: Strategy Research Corporation

Townhomes and condominiums are equally as popular among San Antonio Hispanics. Less than 3% of Hispanics indicated future purchase intent for either a townhouse or condominium.

B. VEHICLE OWNERSHIP

How many Hispanic households own or lease a car, truck or other type of vehicle? Where are auto repairs usually done? And where is it that all those "do-it-yourselfer" Hispanics shop for auto parts and accessories.

1. Vehicle Ownership

The average Hispanic household in San Antonio has 1.7 vehicles, namely an automobile, truck, or other type of motor vehicle.

Overall, 87.4% of all Hispanic households have at least one vehicle.

NUMBER OF
VEHICLES OWNED/LEASED

	Percent
One	35.8%
Two	33.7
Three	11.3
Four	4.4
Five	1.7
Six	0.4
More Than Six	0.1
None	12.6
TOTAL	100.0%
Average Per Household	1.7

Source: Strategy Research Corporation

Precisely, 35.8% of all Hispanic households own/lease one car/truck/other motorized vehicle, while a somewhat similar percentage (33.7%) own/lease two such vehicles.

Meanwhile, an additional 17.9% of all Hispanic households have in excess of two vehicles.

2. Auto Repairs

When their vehicles require maintenance, San Antonio Hispanics will most likely attend to their household's vehicle themselves. Almost two-thirds of Hispanics (62.6%) stated that they themselves, another family member or even a friend would repair the vehicle's troubles.

Thirty-seven percent, however, indicated that vehicle repair work is done on a retail level. A similar percentage of Hispanics stated that they would bring their car/truck to an area car dealer (14.4%) or a neighborhood garage (13.0%).

PLACE WHERE
AUTO REPAIRS ARE USUALLY DONE

	Percent
Self (Friend or Family Member)	62.6%
Car Dealer	14.4
Neighborhood Garage	13.0
Specialty Shop	9.6
Haven't Needed Yet	0.2
Other	0.2
TOTAL	100.0%

Source: Strategy Research Corporation

Repair work performed by specialty shops such as Midas or Jiffy Lube were mentioned by 9.6% of respondents.

3. Auto Parts & Supplies

Vehicle-owning Hispanics were asked, "Where are auto parts and supplies usually purchased?"

Almost three-fourths of responding Hispanics (73.5%) stated that they usually purchase auto parts and supplies at an auto parts specialty shop.

PLACE WHERE
AUTO PARTS & SUPPLIES
ARE USUALLY PURCHASED

	Percent
Auto Parts Specialty Store	73.5%
Car Dealer	12.9
Discount Store	9.3
Department Store	2.8
Gas Station	0.8
Other	0.7
TOTAL	100.0%

Source: Strategy Research Corporation

Car dealers account for 12.9% of Hispanic auto parts and accessories purchases, while discount stores account for 9.3% of potential sales.

C. CREDIT CARD OWNERSHIP

Credit cards have largely become part of today's society. How many of San Antonio Hispanics hold a credit card? The majority do!

1. Incidence Of Ownership

A total of 52.2% of San Antonio households have at least one member who has at least one type of entertainment/bank card or retail service credit card.

CREDIT CARD OWNERSHIP

	Percent
Yes	52.2%
No	46.5
Don't Know	1.3
TOTAL	100.0%

Source: Strategy Research Corporation

2. Types Of Credit Cards Owned

All credit card-owning households were asked if any of the following types of credit cards were owned by household members:

- Gasoline Company
- Department Store
- MasterCard/Visa
- American Express, Carte Blanche/Diners Club
- Choice/Discover

By far, the most widely owned type of credit cards among cardholders are those issued by local area department stores. Department store credit cards are owned by twice as many Hispanics, compared to all other types of cards. In fact, virtually all (91.8%) San Antonio households have at least one major department store (i.e.: Sears, JC Penney, Dillards) credit card.

TYPES OF CREDIT CARDS OWNED

	Percent
Department Store	91.8%
MasterCard/Visa	47.1
Gasoline Company	44.2
American Express/Carte Blanche/Diners Club	11.7
Choice/Discover	10.5

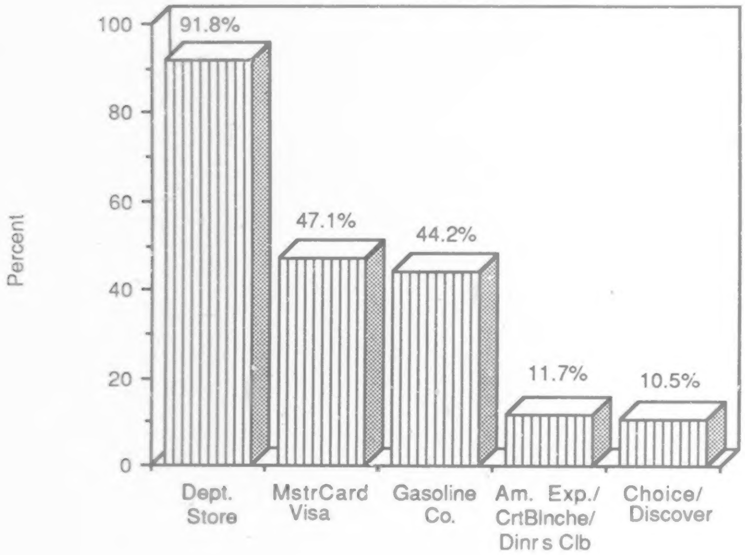
Source: Strategy Research Corporation

Nevertheless, almost half (47.1%) of all Hispanic households have a bank card such as MasterCard or Visa.

An additional 44.2% of Hispanics also have one or more gasoline company credit card.

Approximately 11% of all Hispanics have one of these types of entertainment cards: American Express/Carte Blanche/Diners Club and Choice/Discover.

TYPES OF CREDIT CARDS OWNED



Source: Strategy Research Corporation

D. TELEPHONE OWNERSHIP

Survey respondents were asked if they presently had a telephone in their home. They were also asked to state the number of long distance calls they make in an average month.

1. Incidence Of Ownership

Currently, 81.8% of San Antonio Hispanics have phone service in their home.

TELEPHONE OWNERSHIP

	Percent
Yes	81.8%
No	18.2
TOTAL	100.0%

Source: Strategy Research Corporation

2. Long Distance Calls

All survey respondents were also asked how many long distance phone calls they placed in an average month. These phone calls can be made either from their own or someone else's home, or from a public pay phone.

A total of 57.5% of Hispanics place at least one long distance phone call per month.

NUMBER OF
LONG DISTANCE PHONE CALLS MADE
IN A TYPICAL MONTH

	Percent
One	11.3%
Two	16.0
Three	10.2
Four	4.6
Five	1.4
Six	2.0
More Than Six	12.0
None	42.5
TOTAL	100.0%

Source: Strategy Research Corporation

Eleven percent of Hispanics place one long distance phone call, 16.0% place two calls, 10.2% place three calls, and 8.0% place from 4-6 calls. Twelve percent, however, place more than six long distance calls per month. The vast majority of these long distance calls are made to family and friends in Mexico.

X. LEISURE TIME ACTIVITIES

How do San Antonio Hispanics spend their leisure time? Where do they go, what do they do? The activities of these Hispanics reveal a good deal about their interests and also about their social and family organization.

In order to gain a better understanding of social patterns and characteristics among San Antonio Hispanics, all survey respondents were asked a series of questions concerning participation in sports, social and recreational activities.

Respondents were asked if they themselves, or anyone else in their household, had participated in any of a series of activities and events in the past year. This list included both family/friend events (birthday parties, family reunions/cookouts/picnics, "quinces"), attractions (parades/festivals, circus, live concerts, sporting events) as well as participation in hunting and camping trips.

San Antonio Hispanics are very inclined to attend such family-oriented events as birthday parties (77.5%) and family reunions/cookouts/picnics (69.8%). Further, 38.7% have also been to a Sweet Fifteen/"Quince" party.

As for attractions, 59.5% of Hispanics have attended local parades and festivals in the past year such as *Las Posadas*, *Cinco de Mayo*, and *Fiesta San Antonio*, which is a week-long event.

ATTRACTIONS/EVENTS ATTENDED IN THE PAST YEAR

	Percent
Been To Birthday Parties	77.5%
Had Family Reunion/Cookouts/Picnic	69.8
Watched Local Parades/Festivals	59.5
Been To A Sweet Fifteen/"Quince" Party	38.7
Attended A Professional Sporting Event Such As A Basketball Or Football Game	28.1
Gone Camping/Hunting	24.5
Attended Live Concerts	23.6
Been To The Circus	21.0

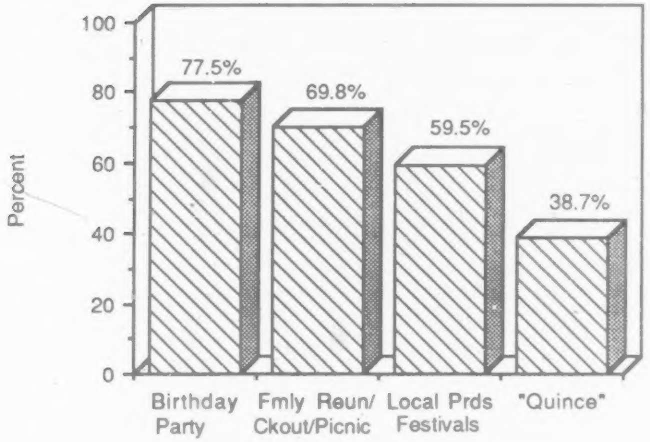
Source: Strategy Research Corporation

More than one-fourth (28.1%) of Hispanics stated that they and/or other household members had attended at least one professional sporting event in the past year. Thus, sports games such as football and basketball games draw relativedly large Hispanic crowds.

As the outskirts of San Antonio are comprised of countryside, numerous rivers, lakes and mountainous area ("Hill Country"), camping and hunting also appear to be popular among Hispanics. Almost one-fourth (24.5%) of all Hispanic households had participated in either of these two types of outdoor activities.

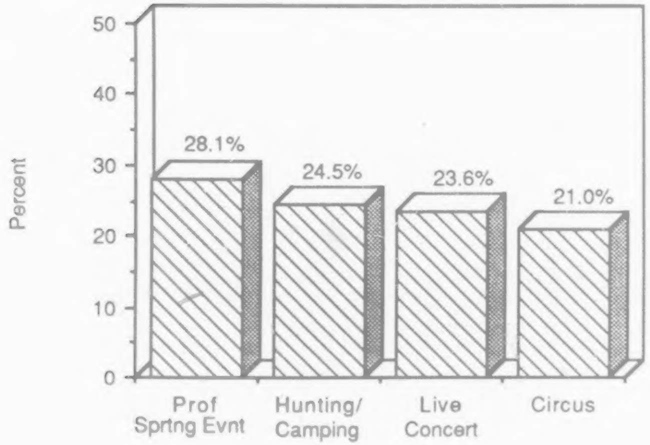
More than one-fifth of all Hispanic households also had at least one family member who either attended a live concert or who had been to the circus.

ATTRACTIONS/EVENTS ATTENDED IN THE PAST YEAR



Source: Strategy Research Corporation

ATTRACTIONS/EVENTS ATTENDED IN THE PAST YEAR



Source: Strategy Research Corporation

XI. AIRLINE TRAVEL PATTERNS

Do San Antonio Hispanics travel by air? What are their reasons for air travel, where do they fly most frequently -- to places within the U.S. and/or to other countries?

In this Study, survey participants were asked if they had taken an airline trip within the past year, the reasons for doing so, and the destinations of their last three trips.

A. PAST YEAR TRAVEL

A total of 14.7% of San Antonio Hispanics traveled by air within the past year.

INCIDENCE OF AIRLINE TRAVEL
WITHIN THE PAST YEAR

	Percent
Yes	14.7%
No	85.3
TOTAL	100.0%

Source: Strategy Research Corporation

B. PURPOSE OF AIRLINE TRAVEL

The most frequently mentioned reasons for traveling by air was for pleasure/personal/non-business. Seven out of ten Hispanics mentioned pleasure/personal reasons as the purposes of their last trip. This pleasure/personal/non-business category includes travel for vacations, educational purposes, for formal celebrations such as weddings, and other such family/friend type visits.

PURPOSE OF AIRLINE TRAVEL
WITHIN THE PAST YEAR

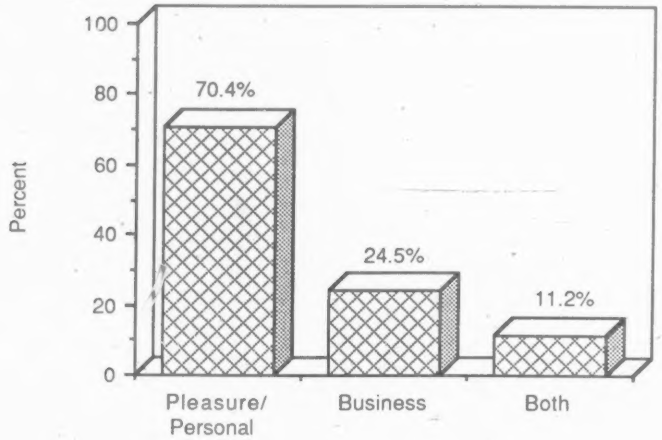
Purpose	Percent
Pleasure/Personal/ Non-Business	70.4%
Business	24.5
Both	11.2
TOTAL	*

* Multiple Response

Source: Strategy Research Corporation

The second most frequent motive for airline travel among San Antonio Hispanics was for business-oriented reasons (24.5%).

PURPOSE OF AIRLINE TRAVEL



Source: Strategy Research Corporation

C. FLIGHT DESTINATIONS

What are the most common destinations for San Antonio air travelers? Air travelers were asked the destinations of their last three flights taken in the past year.

Overall, San Antonio Hispanics tend to travel within the United States much more often than internationally.

Places within the United States were the most popular travel destinations among Hispanics who made airline trips in the past year (60.5%). Within the U.S., 21.9% of San Antonio Hispanics flew to destinations in California, while Las Vegas was visited by 15.6%.

Mexico is ranked in second place as a travel destination (20.9%), which exemplifies the strong ties that San Antonio Hispanics have with their family and friends.

DESTINATION
OF LAST THREE AIRLINE TRIPS
WITHIN THE PAST YEAR

	Percent
Mexico	20.9%
Texas	17.0
Dallas	9.9
Houston	3.9
Other Texas	5.0
Other U.S.A.	60.5
California	21.9
Las Vegas	15.6
New York	3.2
New Orleans	3.1
Washington, D.C.	3.0
Other U.S.	24.7
Central/South America	1.6
Europe	2.2
Other	9.5
TOTAL	*

* Multiple Response

Source: Strategy Research Corporation

Overall, 17.0% of Hispanics flew to cities in Texas itself, most notably Dallas (north -- 280 miles) and Houston (east -- 200 miles). Dallas was mentioned by 9.9% of responding Hispanics, and Houston was mentioned by 3.9%.

XII. EXECUTIVE SUMMARY

- The San Antonio area has the fourth largest Hispanic population in the United States after Los Angeles, New York and Miami.
- The 1988 Hispanic population of the 25-county San Antonio ADI is estimated at just under one million (943,000), or 48.4% of the total area population.
- The population of the San Antonio Metro Area (Bexar, Comal, and Guadalupe Counties) is estimated at 731,600. This tri-county area accounts for almost 80% of the total ADI Hispanic population.
- There are an estimated 254,400 households in the San Antonio ADI headed by Hispanics; 201,300 of these households are in the San Antonio Metro. Hispanic households represent approximately 42% of all area households.
- Virtually all Hispanics in San Antonio are of Mexican origin/descent (94%). Spaniards account for 4% of all Hispanics in the area.
- 74% of Hispanics were born in the U.S., while 26% were born in another country.
- The average length of residence of Hispanic heads of household in the San Antonio area is 23 years.
- Average household size is larger among Hispanics (3.6 persons) than non-Hispanics (2.9).
- The average age for San Antonio Hispanics is 27 years. Approximately 41% of the San Antonio market is under 18 years of age, while 28% are between the ages of 18 and 34.
- Almost one-fourth of San Antonio Hispanics hold white collar jobs, 50% work in blue collar jobs.
- Currently, there are 1.2 persons with full-time employment in Hispanic households.
- 43% of Hispanic heads of household have completed high school; 14% have college level training.
- Total annual household income for San Antonio Hispanics averages $20,600.
- This represents an adjusted annual buying power for Hispanics of $3.6 billion in the San Antonio Metro area, and $4.6 billion in the ADI.
- Spanish is the primary language of Hispanics at home. However, at work and on social occasions, approximately four out of ten Hispanics speak both Spanish and English.
- Hispanics attach great importance to preserving their language: more than 92% feel that it is important for their children to read and write Spanish perfectly.
- In addition to language, Hispanics emphasize the importance of traditional cultural values and show pride in their heritage. Aspects such as family ties and enjoyment of Latin music are instances of continuing identification with their culture.
- 95% of Hispanics patronize chain supermarkets most often.

- Weekly food store expenditures average $90.87.
- 84% of Hispanics patronize at least one department store per month.
- On average, when shopping, Hispanics are usually accompanied by 2.3 other persons.
- 84% of Hispanics patronize fast food hamburger and chicken restaurants; 65% eat fast food pizza.
- Fast Food Restaurants -- Frequency of Patronage:

Hamburger	4.4 times/month
Chicken	4.2 times/month
Pizza	2.3 times/month

- Incidence of Household Consumption/Use:

Carbonated Soft Drinks	94.3%
Pasta	91.8
Cereal	88.7
Snack Foods	81.1
Cosmetics	70.8
Eyeglasses	67.7
Candy	57.9
Beer	52.4

- 82% of San Antonio Hispanic households have a telephone.
- 87% of Hispanic households have a car, truck or other vehicle. The average number of vehicles per household is 1.7.
- 63% of Hispanics perform do-it-yourself maintenance and repair work on their vehicles.
- As regards home ownership, 69% of Hispanics own their homes.
- 30% of those who currently rent and 5% of those who already own plan to buy a home within the next year. The majority of Hispanics (94%) favor single-family homes over other types of homes.
- 52% of Hispanics have credit cards, the most popular ones being the department store type (92%), MasterCard/Visa (47%), and Gasoline (44%).
- 15% of Hispanics traveled by air within the past year.
- The primary reason for travel was for pleasure/personal. In second place, Hispanics traveled for business reasons.
- The main flight destinations for Hispanic air travelers are California (22%), Mexico (21%), Texas (17%), and Las Vegas (16%).
- San Antonio Hispanics are very inclined to attend such family-oriented events as birthday parties and family reunions/cookouts/picnics. Local parades and festivals are also very popular.

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THE 1988 PHOENIX/TUCSON HISPANIC MARKET

Strategy Research Corporation ®

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33

KTVW

LO NUESTRO

FOREWORD

This Study, *THE 1988 PHOENIX/TUCSON HISPANIC MARKET*, is the most recent in the series of Hispanic Market Studies conducted and published by Strategy Research Corporation over the past 17 years. It is the second Study dealing specifically with the Phoenix/Tucson area.

This series of studies conducted by Strategy Research Corporation presents current population data, market profile information, shopping pattern data, and product usage information to the marketing practitioners of the U.S. These data have been used by public and private sector demographers, planners and marketers to develop reliable and effective programs.

CITY OF PHOENIX

Terry Goddard, Mayor

May 4, 1988

"The 1988 Phoenix/Tucson
Market Study"
The Executive Park Hotel
1100 North Central Avenue
Phoenix, AZ 85004

Dear Friends:

In the three years since the last published analysis of the Hispanic market in our City, Phoenix has moved ahead on many fronts. Our Hispanic residents have continued to make important contributions to the life and growth of the City, and I am pleased to see their role recognized in the publication of the "1988 Phoenix/Tucson Hispanic Market Study."

As you review the many dimensions of the Hispanic market documented in this Study, I hope that you will come to share my appreciation of the strong and positive role that our Hispanic residents play in the City's economic and civic affairs. From this community have come growing numbers of outstanding leaders in the arts, in government, and in business.

My sincere appreciation goes to KTVW, Channel 33, for their support of the "1988 Phoenix/Tucson Hispanic Market Study," and to Strategy Research Corporation for carrying out this valuable research.

The City of Phoenix, and in particular the Hispanic community, join me in expressing my appreciation for preparing this report.

Sincerely,

Terry Goddard
Mayor

rd

Municipal Building, 251 West Washington Street, Phoenix, Arizona 85003 • (602) 262-7111

PREFACE

33
KTVW
LO NUESTRO

April 11, 1988

PREFACE

THE 1988 PHOENIX/TUCSON HISPANIC MARKET STUDY

Dear Readers:

In recent years, the Phoenix/Tucson Hispanic American population has experienced a significant growth and development.

Hispanic Americans continue to be on the move, creating new businesses, generating new jobs and generating wealth. Hispanics have to be recognized as an important force in the growth of the State of Arizona; making significant contributions to the continued growth of our state.

KTVW-TV, Channel 33 in Phoenix and Channel 52 in Tucson are committed to the growth of the state and its people. This Hispanic Market Study conducted by Strategy Research Corporation will help in understanding the dynamics of the Hispanic Market.

Most cordially,

Gustavo G. Godoy
Vice President, General Manager
KTVW-TV, Channel 33

3019 East Southern Avenue • Phoenix, Arizona 85040 • (602) 243-3333

ARIZONA
HISPANIC CHAMBER OF COMMERCE

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Dr. Ray Pisano
Al Preciado
George Quezada
Joe Ritter
Mary Ann Sommer
Liz Topete Stonefield
Gary Trujillo
Patrick Lopez
Ex Officio
Legal Counsel

April 11, 1988

Dear Participants:

With the projected increase in the Hispanic population the need to know the trends and expectations of the community become more vital to the business entities. Participation in local marketing research can serve as a beneficial tool in identifing critical data to better serve the Hispanic consumer.

The Arizona Hispanic Chamber of Commerce recognizes the need to identify and address the needs to the Hispanic community and welcomes the opportunity to participate in the marketing research venture.

On behalf of the Arizona Hispanic Chamber of Commerce, I would like to welcome all those participating in this important research.

Respectfully,

Ray Arvizu

Ray Arvizu
President

Post Office Box 4323, Phoenix, Arizona 85030 Phone (602) 234-1873

100 years
Phoenix Metropolitan
Chamber of Commerce

Dear Friends and Business Associates:

The Phoenix Metropolitan Chamber of Commerce is pleased to be a part of this extremely important Hispanic Market Study. This research document, coupled with supporting data, depicts growing opportunites within the Hispanic community for commerce.

The Phoenix Chamber urges Arizona businesses to seriously review their marketing strategies in order to take advantage of the expanding markets outlined in this professionally produced study.

The Chamber also wishes to thank KTVW for their efforts in producing the Hispanic Market Study. Their dedication to this project has been unwavering and deserves recognition by the Arizona business community.

Sincerely,

Jim Haynes
President

34 W. Monroe St., Phoenix, AZ 85003 602/254-5521

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I. PURPOSE, SCOPE AND METHODOLOGY

A. PURPOSE OF THE STUDY

Phoenix, capital of Arizona, is the state's largest metropolitan area. The Phoenix ADI (Area of Dominant Influence) is comprised of eleven counties and it ranks 14th in terms of the absolute number of U.S. Hispanics. The Tucson ADI, which consists of four counties, ranks 19th in terms of U.S. Hispanic population. Numerically, the vast majority of Hispanics (284,500) within the Phoenix ADI reside in Maricopa County, while within the Tucson ADI, the majority of Hispanics (162,000) are located in Pima County. When the Hispanic populations of the Phoenix and Tucson ADIs are combined, they account for approximately 94% of Arizona's total Hispanic population.

Arizona, which ranks seventh among all states in terms of Hispanic population, ranks fourth among the states in terms of Hispanic concentration. That is, the three states accounting for the major proportions of Hispanics are California (32%), Texas (22%), and New York (10%). The state of Arizona, with 3% of all U.S. Hispanics, ranks seventh. On an individual state basis, Arizona ranks fourth in the proportion of Hispanics to the total population -- approximately 18% of Arizona's population is of Hispanic origin/descent (37% of New Mexico's total population is Hispanic, as is 23% of Texas' and 21% of California's).

With a strong and vibrant Mexican heritage, the Phoenix/Tucson area has become the new hometown for many Hispanics in the eighties. The Hispanic community has become one of the fastest growing segments in the Phoenix/Tucson area. In Maricopa County alone, the Hispanic population has grown 43% since 1980; in Pima County, a 45% growth in Hispanic population has taken place since 1980. Hispanic population growth in the eighties, as projected, will exceed the growth of the sixties and seventies.

The objective of this Study is to provide up-to-date data on this large and growing market that offers marketers scope, opportunity and challenge. This objective has been addressed by considering and evaluating several key aspects of this market:

- Demographic Characteristics: What is the size of the Hispanic market? What are the components and countries of origin of Hispanics in the Phoenix/Tucson area? How long have they lived in the area?

- Social Characteristics: A range of social/lifestyle behavior, including family size, work, education, and language usage were explored.

- Purchase and Ownership Patterns: What are the priorities and habits of Hispanics in the Phoenix/Tucson area with regard to financial expenditure?

To achieve these objectives, Strategy Research Corporation conducted a Study utilizing as a basis the Survey Research Method. Employed was a carefully studied and comprehensive sample design. A detailed questionnaire which incorporated the areas and topics of concern was constructed and tested, and effective fieldwork controls throughout the data gathering phase of the Study was implemented.

The results of this planning have yielded, in this *1988 Phoenix/Tucson Hispanic Market Study*, a thoroughly detailed and up-to-date database for reaching this unique and dynamic sector.

B. SCOPE OF THE STUDY

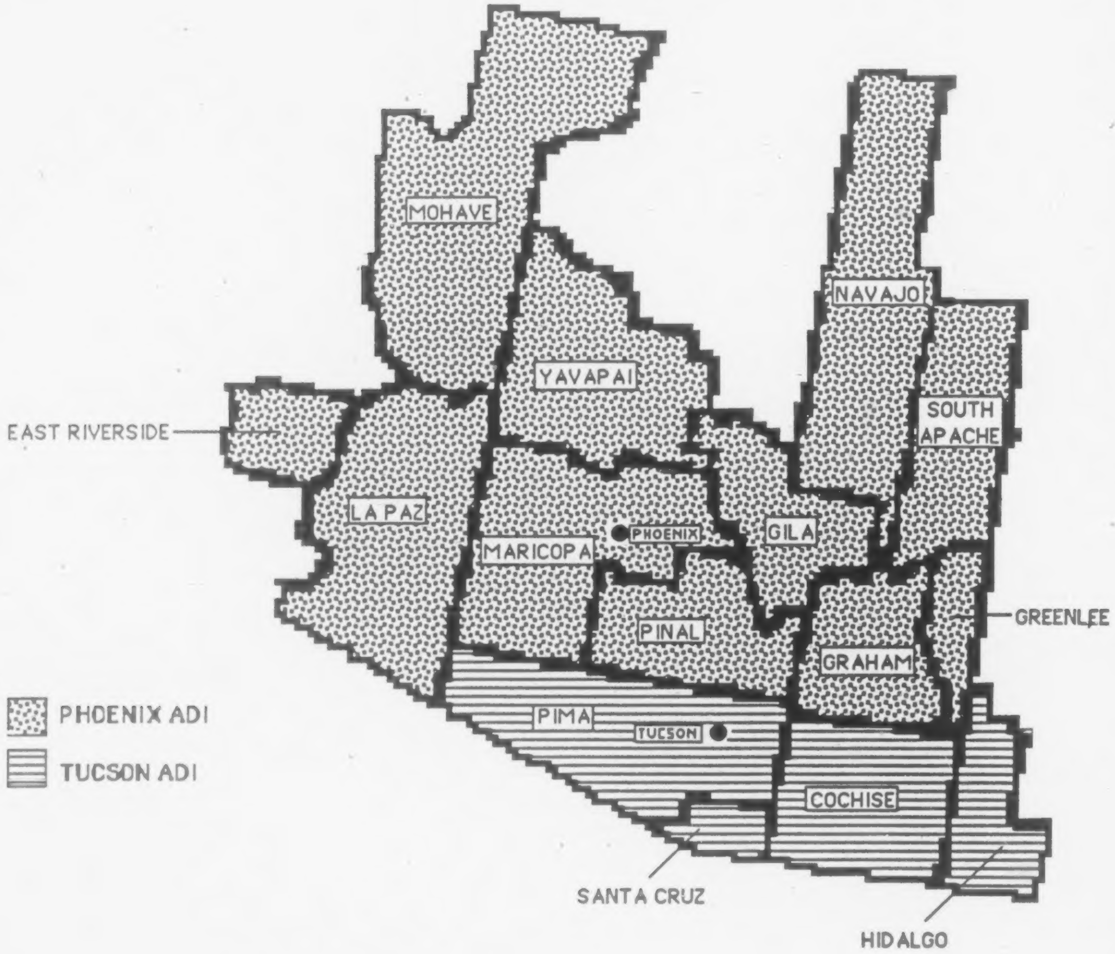
The Scope of this Study is the Phoenix/Tucson market area. The primary market center/metropolitan area of the Phoenix ADI is Maricopa County, while Pima County is the primary county and metropolitan area of the Tucson ADI.

COUNTIES COMPRISING THE
PHOENIX/TUCSON ADI - 1988

PHOENIX ADI	**TUCSON ADI**
County/State	County/State
Apache South, AZ	Cochise, AZ
Gila, AZ	Pima, AZ
Graham, AZ	Santa Cruz, AZ
Greenlee, AZ	Hidalgo, NM
La Paz, AZ	
Maricopa, AZ	
Mohave, AZ	
Navajo, AZ	
Pinal, AZ	
Yavapai, AZ	
E. Riverside, CA	

The Study presents secondary population statistics and primary demographic data.

PHOENIX/TUCSON, ARIZONA ADIs


MOHAVE
YAVAPAI
NAVAJO
SOUTH APACHE
EAST RIVERSIDE
LA PAZ
MARICOPA
PHOENIX
GILA
PINAL
GRAHAM
GREENLEE
PIMA
TUCSON
COCHISE
SANTA CRUZ
HIDALGO
PHOENIX ADI
TUCSON ADI

C. METHODOLOGY EMPLOYED

Strategy Research Corporation conducted both primary and secondary research in the gathering of information provided in this Report.

Secondary data sources are cited such as the publications of the U.S. Department of Commerce, Bureau of the Census, including both census findings and projections. State and Federal sources were also used, as well as material from Government sources dealing with Hispanics in the United States.

Population totals are drawn from U.S. Department of Commerce, Bureau of the Census published reports. Population forecasts utilized in the Study were made by Strategy Research Corporation.

With regard to the primary data presented in this Study, the methodology utilized was the Survey Research Method.

A total of 608 personal, in-home, face-to-face interviews were conducted with Hispanic heads of households (408 - Phoenix market area, 200 - Tucson market area).

The sampling method utilized a stratified, segmented, random probability sample of Hispanic households.

The sample was drawn by Strategy Research Corporation's professional sampling staff. A Clustering technique was used, procedural in samples for in-home interviews. The sampling cluster points were actual Census blocks as designated by the Bureau of the Census. Strategy Research Corporation maintains currently updated Census block, Census tract, and household data for survey and economic research purposes. A random probability sample was pulled, using a random starting point and a sequential interval of persons.

Once a random skip pattern was established, sampling points were assigned to their appropriate Census blocks. These statistics were transferred to Census block maps and then to street maps. For each block, one of six random house selection patterns was chosen randomly, and individual block maps were labeled with street names, starting points, skip patterns, and rotation directions. Nine interviews were completed within each cluster, which consists of one sample block.

Interviews were conducted by trained, professional interviewers of Strategy Research Corporation, working under direct supervision of Strategy Research Corporation staff Field Supervisors.

All interviewers were bilingual and of Hispanic origin. Interviewers were carefully trained in the use of the questionnaire and in the conduct of the interview.

A minimum of 20 percent of each interviewer's work was validated daily by staff Supervisors of Strategy Research Corporation. All questionnaires were then carefully edited, coded, and prepared for computer tabulation.

All programming and data processing was done in-house by Strategy Research Corporation personnel. Strategy Research Corporation operates a major in-house marketing research main frame computer facility.

Interviewing for this Study was conducted in April, 1988.

Technical Note:

The definition of a Hispanic is a person who designates himself or herself to be of Latin (Hispanic) origin or of Latin (Hispanic) ancestry. This is the same definition currently employed by the Bureau of the Census.

Strategy Research Corporation employs the best of industry practices and standards in its work and utilizes the best efforts to produce reliable studies. Nevertheless, no claim is made that the Study is free of all errors, and the Firm accepts no liability for the information or interpretation within this Report.

II. THE HISPANIC UNIVERSE

A. INTRODUCTION

Phoenix and Tucson are among the fastest-growing metropolitan areas in the United States. Hispanics are found in large concentrations within both Phoenix and Tucson, and as such, they have had and will continue to have a substantial impact on the area's economy.

The Phoenix and Tucson markets both have a rich Hispanic heritage due to their geographic proximity to the Mexican border as well as the former possession of the area by Mexico.

As of July 1988, the total Hispanic population of the 15-county market area is estimated at 583,300 persons. This figure represents 17.6% of the total population in this 15-county market area. Maricopa County, located within the Phoenix ADI, accounts for the largest absolute number of Hispanics (284,500), followed by Pima County (162,000 Hispanic population) which is in the Tucson ADI. Together, Maricopa and Pima Counties comprise 76.5% of the area's total Hispanic population.

Hispanics within the Phoenix/Tucson market are spread throughout the counties within the area, however, heavier Hispanic concentrations are found in areas closest to the Mexican-American border. Conversely, counties with lower concentrations are those farthest from the international border.

Virtually all Hispanics in the Phoenix/Tucson area are of Mexican origin or descent.

This section of the Report discusses the history and development of the Phoenix/Tucson Hispanic market and cites the population growth of the area from 1970 to 1988. These data are then expressed in terms of household size and number of households in the Hispanic community.

The following sub-section presents a short history of the Hispanic populace in the Phoenix/Tucson market and recaps the historical evolution of the Hispanic influence in the Phoenix/Tucson area.

B. HISTORY OF THE PHOENIX/TUCSON HISPANIC MARKET

Introduction

Aztlán, the mythical homeland of the Aztecs, was the name given to the Southwest by the Nahua Indians -- forefathers of the Aztec and Hohokam Indians. Some of the Nahua Indians traveled south and built a city called Tenochtitlán (present-day Mexico City). Thus, the Aztec civilization was born. Those who stayed behind, the Hohokam, built villages and developed the Southwest region. The Hohokam grew into two groups: the Pimas ("river people") and the Papagos ("bean people"). The Pimas basically followed the lifestyle of the Hohokam. They lived in one-room houses, made pottery and built irrigation ditches. The Papago, on the other hand, were a semi-nomadic people who lived mainly off the land and used wild beans as their main food source.

After the Spanish conquered the Southwest and blended with the Indians, a new culture was born -- the Mexican. For 250 years, three cultures (Indian, Spanish and Mexican) intermingled and contributed to the development of the Southwestern region. When the Anglo-American arrived, another culture was added to the blend. The Southwest, as we know it today, is a *mestizo* of different cultures: the Indian, the Spanish, the Mexican, the Anglo-American, and the Mexican-American. The Mexican-American is not a different group of people altogether, but rather a people that have kept their Mexican heritage while at the same time have adapted to the American way of life. This is their history. . .

Early History

When the Spanish explorer Cabeza de Vaca reached Mexico City in the early 16th century, his reports of the Southwest mentioned great wealth in that region. Other Spanish explorers were inspired by Cabeza de Vaca's accounts of Cíbola (the seven cities of gold). Marcos de Niza (1539), Vázquez de Coronado (1540), and Hernando de Soto (1541) also traveled throughout the Southwest in search of the seven cities, but all failed to find Cíbola or gold. Early northward expansion by the Spaniards was carried out with the help of the Nahua-speaking Indians.

With the discovery of wealth in the silver mines near Mexico City, Spanish settlement in the Southwest was halted for nearly half a century. International rivalry, sparked by Sir Francis Drake's global circumnavigation, encouraged the Spanish to colonize the Southwest region. The Spaniards believed that Drake had found the Northwest Passage (Strait of Anián) instead of sailing around Cape Horn. In order to protect the Crown's territorial interests, the Spanish sent out an expedition in 1598 led by Juan de Oñate to colonize the Southwest region.

No permanent settlement in the Phoenix/Tucson area was made until the end of the 18th century. The presence of aggressive Indians, lack of water and the absence of precious ores, slowed the development of this area. Father Eusebio Kino, a Spanish missionary working with the Pima Indians, was the catalyst for colonization. His efforts resulted in the founding of the mission San Xavier del Bac in the early 1700's. The mission was completed in 1774 under the supervision of Fr. Francisco Garcés.

Once known as the only walled city in America, Tucson was founded in 1775 on the banks of the Santa Cruz River by an expedition of Spanish settlers led by Hugo O'Conor. The area they had designated as their settlement was close to an old Papago *ranchería* called *Chuk Shon*, which meant "dark color at the base of the mountain" (referring to Sentinel Mountain). The Spanish pronunciation of *Chuk Shon* sounded more like *Tuqui Son*, which eventually evolved into the present-day Tucson.

In the latter part of the 18th century the continued attacks by the Apaches on the inhabitants, the incursion of French traders from Louisiana, and the discovery of some copper mines all contributed to the push and pull of migration and settlement in this area.

Mexico's independence from Spain in 1821 was a result of civil unrest in the Southwest. The Indians, unhappy with Spanish rule rebelled, causing Spain to lose its territorial rights of the Southwest region. But soon the American inhabitants of the area began to rebel against Mexican rule. After the Texas War and the defeat of Santa Ana at the San Jacinto River in 1836, there were tensions between Mexico and the United States. This eventually led to the Mexican-American war in 1846 and to the United States' acquisition of the states of Texas, New Mexico, Arizona, California, Nevada, Utah, and parts of Wyoming, Colorado, Kansas, and Oklahoma.

The Treaty of Guadalupe Hidalgo -- signed on February 2, 1848, delineated the boundary between Mexico and the United States. As a result, those people living north of the boundary automatically became American citizens or they had the option of returning to Mexico. Only about 2,000 chose to return.

With the westward expansion and gold rush came the need for communication between the two coasts of the United States. Stage lines and pony express were the two means of communicating between the eastern states and the rough western terrain. Railroad companies in the east began discussing the construction of a transcontinental line; however, under the Mexican-American territorial boundaries one major stop -- the city of Tucson -- was still part of Mexico. As a result, the U.S. sent James Gadsden to Mexico to attempt to acquire this land for the U.S. The Gadsden Purchase, made in 1853, ensured that this portion of land which included Tucson belonged to the United States. As was with the Treaty of Guadalupe Hidalgo, the inhabitants of the area were allowed to stay and enjoy the rights of citizenship or they could return to Mexico if they wanted.

In 1863, Arizona was designated as a separate territory. Although the majority of the population was Mexican, only three political offices were held by Mexicans. By 1865, the population of Tucson totalled only 200.

Nearly a century after the founding of Tucson, a new city was established -- Phoenix. It was originally called Smith's Station due to the fact that it was first set up in 1867 as a "hay camp" for the nearby forts by John Smith. In that same year, the Swilling Irrigation Canal Co. was established by Jack Swilling, using the same ancient irrigation canals designed by the Hohokam Indians. As the village grew and prospered, the inhabitants realized their community needed a name. Several names were suggested, but finally an Englishman by the name of Darrell Duppa suggested the village be called Phoenix on the basis that the rich fertile valley had once been occupied by pre-Columbian peoples. He prophesized that another great civilization would emerge, Phoenix-like, from the ashes of the old.

In 1867, Tucson was named the territorial capital of Arizona, and it remained the capital for ten years. In 1871, the population of Tucson totalled 3,000; thus in a six-year span, the population of the city had increased by 1400%. Freighting wagons built during this time helped to increase the area's population and improve the economy. The Apache Indians, resentful of their new conquerors (the Americans), began to attack Tucson's citizens and their houses. Mexicans and Americans joined forces to fight the Apaches, encouraging the citizens to act as vigilantes.

It wasn't until the late 1800's that Hispanics began to emerge as a powerful sector of the community. Among the most prominent Hispanic businessmen were Estévan Ochoa, Mariano Samaniego, and Leopoldo Carrillo. Carrillo and Ochoa both set up freighting businesses. However, the arrival of the railroad in 1880 brought a time and cost-saving factor in the overland shipping business, wiping out Ochoa and Carrillo. Carrillo set his sights on other business endeavors. He built the first bowling alley in Tucson as well as an ice cream parlor/saloon and a large feed stable. Carrillo also owned land nearby, some of which he developed by building houses. In 1875, Estévan Ochoa became the first -- and only -- Hispanic mayor of Tucson. Samaniego was very active politically. He served four sessions of the Territorial House of Representatives, three terms as city councilman, and one term as Pima County Assessor. Samaniego also served on the Pima County Board of Supervisors and was appointed a member of the first Board of Regents for the University of Arizona. In 1877 *Las Dos Repúblicas*, the first Hispanic newspaper in Tucson, was founded. It was followed by *El Fronterizo* in 1878.

On March 20, 1880, the Southern Pacific Railroad arrived in Tucson, bringing with it new business and employment opportunities as well as an increase in population. At this time, the railroad became the largest employer of Hispanics in the area. In 1887 the Maricopa, Phoenix and Salt River Railroad was built from Phoenix to Maricopa where it joined the Southern Pacific line. Phoenix was named the territorial capital in 1889.

The 20th Century Hispanics

A new wave of Mexican immigrants seeking employment opportunities began to arrive in the Phoenix/Tucson area in the early 1900s. The Mexican Revolution of 1910 also resulted in an increased Hispanic population of the area.

In 1912, Arizona became the 48th state of the United States of America. Throughout all these years, Tucson had remained the largest city in Arizona; in 1920 it lost its lead to Phoenix. In that same year, Phoenix was marketed as a city "where winter never comes," bringing thousands of new residents. At this time, Phoenix was the largest city in the area between El Paso and Los Angeles.

Rapid changes in Mexican immigration patterns resulted from the United States' entry into World War I. The lack of males in the work force during the 1920's resulted in thousands of Mexican laborers crossing the border into the Phoenix/Tucson area seeking labor opportunities offered by the railroads. This sudden influx of laborers willing to work for minimal wages caused the work force to be overflowed with too many workers and not enough jobs. During this same time, Mexican-Americans already established in the Phoenix/Tucson area began to migrate to midwestern and northeastern cities like St. Louis and Chicago.

The repatriation pressures of 1921, brought on by postwar business depression, resulted in the repatriation of thousands of Mexicans with financial assistance from the Mexican government. Since the majority of these Mexican workers were employed in the Southwestern states, the area's economy and population were greatly impacted. However, restrictions on European immigration in 1924 once again opened the door of opportunity for Mexican workers.

In the past five years, the political and economic situations south of the border have resulted in the immigration of thousands of Spanish-speaking people. Specifically, the economic instability in Mexico and the political unrest in Central America have been the major catalyst in increasing the number of recent arrivals not only in the Phoenix/Tucson area, but also the rest of the U.S. Why do these Hispanics come to the U.S.? Primarily because they look to the U.S. as the "Land of Opportunity," offering them and their families a better life in terms of civil rights and financial improvement. In addition, many of the recent arrivals already have extended family members who are financially established residing in the U.S.

Throughout the 20th century, various factors have all contributed to the size and shape of the Phoenix/Tucson Hispanic market. Today, Hispanics play a vital role in the industrial, agricultural, artistic, intellectual and political life of the Phoenix/Tucson area, but the significance of this group cannot be measured solely in terms of present-day accomplishments.

It is certain that this area as we know it would not exist without the Mexican-Spanish heritage. That which sets Phoenix off from Provo and differs Tucson from Tacoma is in large measure the result of the activities of the ancestors of citizens of Mexican descent.

In many sections of the Southwest, Mexican-Americans are the majority population, and their language and culture serve to provide the entire region with much of its distinctiveness. The American way of life has been and is being immeasurably enriched by their presence north of the present-day international boundary.

C. POPULATION GROWTH IN THE PHOENIX/TUCSON AREA: 1970-1988

Total population growth in the recent three decades has been significant for the Phoenix/Tucson area. The total population of the ADI increased by almost 1.7 million people between 1970 and 1988. This represents an increase in total population of 101%.

A most dramatic increase in the overall population of Phoenix/Tucson has occurred between 1970 and 1980. In 1970, the entire population of Phoenix/Tucson stood at 1,652,280 persons. By 1980, Phoenix/Tucson's population had grown to 2,552,422. Thus, total population growth in the area for this 10-year period increased by 54.5%. This percentage growth was witnessed in approximately equal proportions within both Phoenix as well as Tucson (54.3% and 54.9%, respectively).

PHOENIX/TUCSON
POPULATION GROWTH
1970 - 1988

Year	Phoenix Population	Percent Change	Tucson Population	Percent Change	Total Population	Percent Change
1970	1,206,390		445,890		1,652,280	
		>54.3%		>54.9%		>54.5%
1980	1,861,900		690,522		2,552,422	
		>33.5%		>20.7%		>30.0%
1988	2,484,900		833,400		3,318,300	

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Currently, Strategy Research Corporation estimates the July 1, 1988 Phoenix/Tucson population at 3,318,300 which represents an increase of 765,878 persons since 1980 (30.0% growth). In this regard, the Phoenix ADI registers a greater percentage increase in total population than Tucson. Specifically, total population growth from 1980 to 1988 in the Phoenix area is estimated at approximately 33.5%, while in Tucson, a 20.7% increase is estimated.

D. HISPANIC POPULATION GROWTH IN THE PHOENIX/TUCSON AREA: 1970-1988

1. Total Growth

The Hispanic population in the Phoenix/Tucson ADI has shown a steady increase since 1970.

The Hispanic population in 1970 was 220,600 persons. This represented 13.4% of the total population of the Phoenix/Tucson ADI at that time. By 1980, Phoenix/Tucson's Hispanic population had grown to 410,000 persons which represented 16.1% of the total population.

PHOENIX/TUCSON ADI
TOTAL/HISPANIC POPULATION
1970 - 1988

Year	Total Population	Hispanic Population	Percent Hispanic
1970	1,652,280	220,600	13.4%
1980	2,552,422	410,000	16.1
1988	3,318,300	583,300	17.6

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Strategy Research Corporation estimates the July 1, 1988 Hispanic population of the Phoenix/Tucson ADI to be 583,300 persons, which represents approximately 17.6% of the total area population.

2. Individual ADI Growth

Individually, both ADIs show a steady Hispanic population growth. In 1970 Hispanics constituted 18.4% of Tucson's total population, while in 1988 the percentage has increased to 26.0%.

Hispanics in Tucson, however, comprise a greater percentage of the population than do Hispanics in Phoenix.

PHOENIX/TUCSON
TOTAL/HISPANIC POPULATION
1970 - 1988

	Phoenix			Tucson		
Year	Total Population	Hispanic Population	Percent Hispanic	Total Population	Hispanic Population	Percent Hispanic
1970	1,206,390	138,600	11.5%	445,890	82,000	18.4%
1980	1,861,900	256,300	13.8	690,522	153,700	22.3
1988	2,484,900	366,900	14.8	833,400	216,400	26.0

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

In 1970 Hispanics represented 11.5% of the Phoenix ADI's total population base, compared to 14.8% in 1988.

E. HISPANIC CONTRIBUTION TO DEMOGRAPHIC GROWTH: 1970-1988

From 1970 to 1980 the Hispanic population shows a substantial growth of 85.8%, at the same time as the non-Hispanic population increased by only 49.6%.

The 1988 estimates show Hispanic population continuing to grow at a fast pace. Specifically, from 1980 to 1988, Hispanic growth in the Phoenix/Tucson ADI grew by 42.3%; non-Hispanic growth for this same period registers at 27.6%.

PHOENIX/TUCSON ADI
POPULATION GROWTH
HISPANIC VS. NON-HISPANIC
1970 - 1988

	1970	1980	Net Change 1970-1980	Percent Change 1970-1980	1988	Net Change 1980-1988	Percent Change 1980-1988
Non-Hispanic	1,431,680	2,142,422	710,742	49.6%	2,735,000	592,578	27.6%
Hispanic	220,600	410,000	189,400	85.8	583,300	173,300	42.3
TOTAL	1,652,280	2,552,422	900,142	54.5%	3,318,300	765,878	30.0%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Increases on the part of both Hispanic as well as non-Hispanic populations push the total Phoenix/Tucson population to over 3.3 million.

F. HISPANIC POPULATION OF THE PHOENIX/TUCSON ADI

With the exception of East Riverside County (California), all of the counties in both the Phoenix and Tucson ADIs showed increases in Hispanic population since 1980. These increases range from 15% to 61%.

The Phoenix ADI is presently comprised of 11 counties. The two counties in the Phoenix ADI with the highest percentage of Hispanics are Greenlee (49.2%) and Pinal (30.7%). The largest increase in terms of absolute numbers -- 85,000 -- was seen in Maricopa County.

Four counties currently comprise the Tucson ADI which contains 216,400 Hispanics. The two counties in the Tucson ADI with the highest percentage of Hispanics are Santa Cruz (81.9%) and Hidalgo (50.0%). Numerically, the greatest increase from 1980 to 1988 registered in Pima County (50,600 persons), which is in essence the Tucson metro area.

PHOENIX/TUCSON ADI
HISPANIC POPULATION GROWTH
1980 - 1988

County/State	1980 Hispanic Population	1988 Hispanic Population	1980-1988 Percent Increase	Percent Hispanic 1988
PHOENIX ADI				
Apache South, AZ	N/A	500	--	4.2%
Gila, AZ	7,700	9,300	20.8%	21.1
Graham, AZ	N/A	6,800	--	26.3
Greenlee, AZ	5,400	6,200	14.8	49.2
La Paz, AZ	N/A	3,200	--	21.9
Maricopa, AZ	199,000	284,500	43.0	14.4
Mohave, AZ	2,300	3,700	60.9	4.6
Navajo, AZ	4,500	5,600	24.4	6.8
Pinal, AZ	26,800	36,200	35.1	30.7
Yavapai, AZ	4,200	6,200	47.6	6.7
E. Riverside, CA	4,900	4,700	-4.1	20.0
San Bernadino, CA	1,500	N/A	--	--
TOTAL PHOENIX ADI	256,300	366,900	43.2%	14.8%

Continued. . .

PHOENIX/TUCSON ADI
HISPANIC POPULATION GROWTH
1980 - 1988
(CONTINUED)

County/State	1980 Hispanic Population	1988 Hispanic Population	1980-1988 Percent Increase	Percent Hispanic 1988
TUCSON ADI				
Apache South, AZ	600	N/A	--	--
Cochise, AZ	22,900	29,800	30.1%	29.0%
Pima, AZ	111,400	162,000	45.4	23.2
Santa Cruz, AZ	15,200	21,300	40.1	81.9
Catron, NM	800	N/A	--	--
Hidalgo, NM	2,800	3,300	17.9	50.0
TOTAL TUCSON ADI	153,700	216,400	40.8%	26.0%
PHOENIX ADI	256,300	366,900	43.2%	14.8%
TUCSON ADI	153,700	216,400	40.8	26.0
TOTAL PHOENIX/ TUCSON ADI	**410,000**	**583,300**	**42.3%**	**17.6%**

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

G. NUMBER OF HOUSEHOLDS

There are 159,000 households in the Phoenix/Tucson ADI headed by Hispanics. These households represent 12.9% of all households in the market.

PHOENIX/TUCSON ADI
HOUSEHOLD STATISTICS
1988

Population Segment	Population	Households	Persons Per Household	Percent Distribution
Hispanic	583,300	159,000	3.7	12.9%
Non-Hispanic	2,735,000	1,072,600	2.6	87.1
TOTAL	3,318,300	1,231,600	2.7	100.0%

Source: Strategy Research Corporation

The average size of the Hispanic household is 3.7 persons, which is larger than that of the non-Hispanic household (2.6 persons per household).

II. HISPANIC POPULATION/HOUSEHOLDS -- TOTAL POPULATION

With more than three million total persons (3,318,300) and 583,300 Hispanics, the latter currently constitute 17.6% of the total Phoenix/Tucson ADI population.

The Phoenix ADI has a total population of 2,484,900 persons. Overall, Maricopa County has the highest concentration of residents (1,978,700), followed by Pinal County (118,100). Hispanics in Maricopa constitute 14.4% of the total population base, while 30.7% of the population in Pinal County is of Hispanic origin or descent. There are approximately 99,900 Hispanic households in the Phoenix ADI; 76,900 (77%) are located in Maricopa County.

Hispanics represent 26.0% of the total Tucson ADI population (216,400 Hispanics and 833,400 total persons). Pima County is the largest Hispanic county with 162,000 Spanish-speaking persons. On a percentage basis, however, Santa Cruz County is the most "Hispanic" county as 81.9% of the population is Hispanic -- 21,300 Hispanic persons versus a total of 26,000 persons.

PHOENIX/TUCSON
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
JULY 1, 1988

County/State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
PHOENIX ADI				
Apache South, AZ	0.5	0.1	4.2%	11.9
Gila, AZ	9.3	2.9	21.1	44.1
Graham, AZ	6.8	1.8	26.3	25.9
Greenlee, AZ	6.2	2.0	49.2	12.6
La Paz, AZ	3.2	0.7	21.9	14.6
Maricopa	284.5	76.9	14.4	1,978.7
Mohave, AZ	3.7	1.1	4.6	80.6
Navajo, AZ	5.6	1.6	6.8	82.2
Pinal, AZ	36.2	9.6	30.7	118.1
Yavapai, AZ	6.2	2.0	6.7	92.7
E. Riverside, CA	4.7	1.2	20.0	23.5
TOTAL PHOENIX ADI	366.9	99.9	14.8%	2,484.9

Continued. . .

PHOENIX/TUCSON
HISPANIC POPULATION/HOUSEHOLDS - TOTAL POPULATION
JULY 1, 1988
(CONTINUED)

County/State	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
TUCSON ADI				
Cochise, AZ	29.8	8.6	29.0%	102.8
Pima, AZ	162.0	43.8	23.2	698.0
Santa Cruz, AZ	21.3	5.8	81.9	26.0
Hidalgo, NM	3.3	0.9	50.0	6.6
TOTAL TUCSON ADI	216.4	59.1	26.0%	833.4
TOTAL PHOENIX/ TUCSON ADI	**583.3**	**159.0**	**17.6%**	**3,318.3**

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Overall, the 583,300 Hispanics in the Phoenix/Tucson ADI live in 159,000 households. Relative to its population, the vast majority of Hispanic households in the Phoenix ADI (76,900) are located in Maricopa County, while Pima County (Tucson ADI) accounts for 43,800 Hispanic households.

I. DENSITY OF HISPANIC POPULATION BY COUNTY

The density of Hispanic population varies within counties of the Phoenix/Tucson ADI. The densities range from a high of 81.9% for Santa Cruz County, to a low of 4.2% in Apache South. In order to give an idea of the distribution of population densities, the 15 counties were grouped into four density segments: counties where Hispanics represented 45% or more of the total population, counties with Hispanic populations between 25% and 44%, counties with Hispanic populations between 10% and 24%, and counties with less than 10% of Hispanics.

HISPANIC POPULATION DENSITY BY COUNTY FOR PHOENIX/TUCSON ADI (15 COUNTIES)

County/State	Hispanic Population (000)	Percent County Hispanic	Percent Total ADI
45% Or More Hispanic			
Santa Cruz, AZ	21.3	81.9%	
Hidalgo, NM	3.3	50.0	
Greenlee, AZ	6.2	49.2	
Sub-Total (Avg.)	30.8	(68.6%)	5.3%
25% - 44% Hispanic			
Pinal, AZ	36.2	30.7	
Cochise, AZ	29.8	29.0	
Graham, AZ	6.8	26.3	
Sub-Total (Avg.)	72.8	(29.5%)	12.5
10% - 24% Hispanic			
Pima, AZ	162.0	23.2%	
La Paz, AZ	3.2	21.9	
Gila, AZ	9.3	21.1	
E. Riverside, CA	4.7	20.0	
Maricopa, AZ	284.5	14.4	
Sub-Total (Avg.)	463.7	(16.8%)	79.5

Continued. . .

HISPANIC POPULATION DENSITY BY COUNTY FOR PHOENIX/TUCSON ADI (15 COUNTIES)

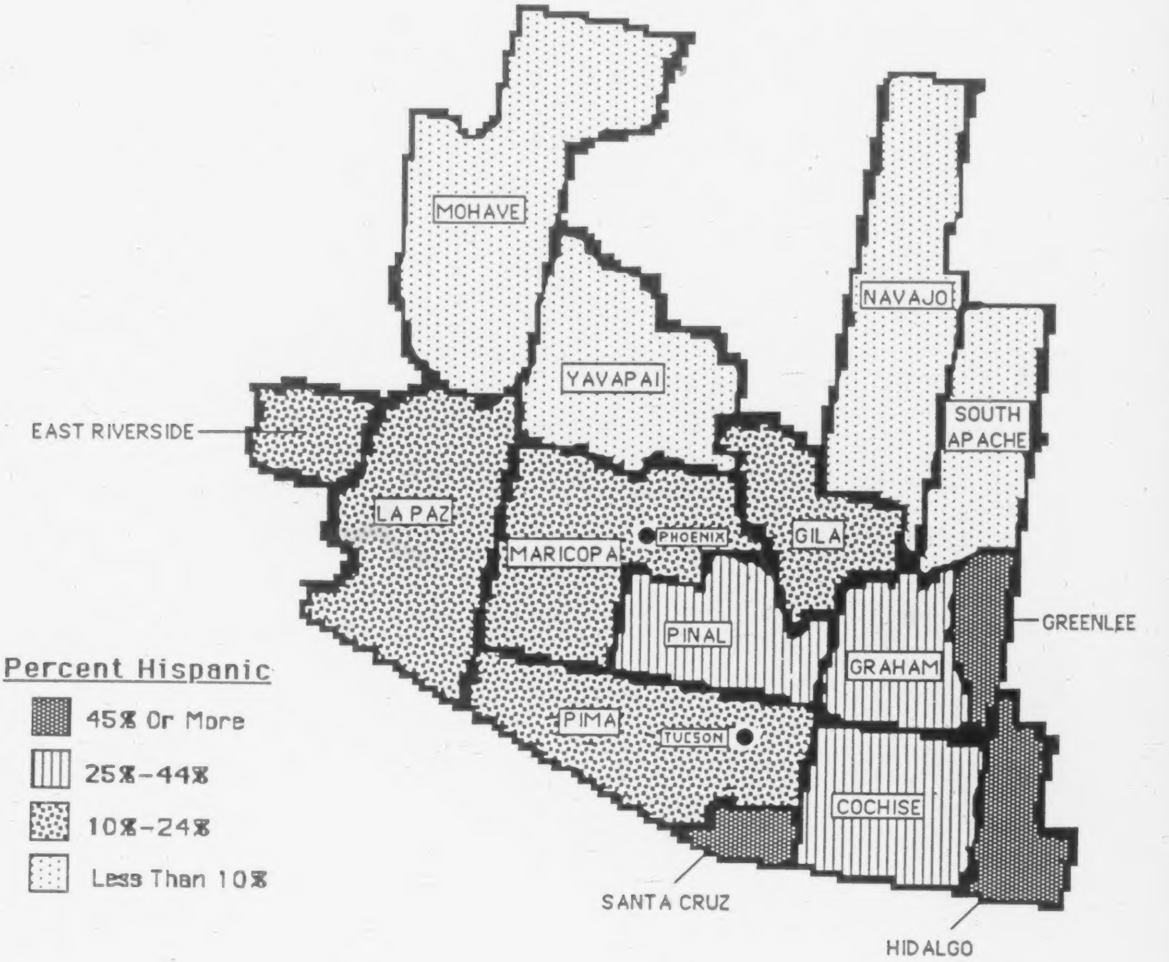
(CONTINUED)

County/State	Hispanic Population (000)	Percent County Hispanic	Percent Total ADI
Less Than 10% Hispanic			
Navajo, AZ	5.6	6.8%	
Yavapai, AZ	6.2	6.7	
Mohave, AZ	3.7	4.6	
Apache South, AZ	0.5	4.2	
Sub-Total (Avg.)	16.0	(6.0%)	2.7%
TOTAL	583.3	17.6%	100.0%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

For greater clarity, the information on population density presented in the table is also shown on the following map which provides a geographic representation of the counties in the Phoenix/Tucson market area. The overall area has been shaded to highlight the densities of the Hispanic population in the area and illustrates clearly Santa Cruz, Hidalgo and Greenlee as the counties of greatest Hispanic population density.

1988
PHOENIX/TUCSON HISPANIC POPULATION DENSITY BY COUNTY


MOHAVE
NAVAJO
YAVAPAI
EAST RIVERSIDE
SOUTH APACHE
LA PAZ
MARICOPA
PHOENIX
GILA
PINAL
GREENLEE
GRAHAM
PIMA
TUCSON
COCHISE
SANTA CRUZ
HIDALGO
Percent Hispanic
45% Or More
25%-44%
10%-24%
Less Than 10%

III. MARKET PROFILE AND CHARACTERISTICS

An estimated 583,300 Hispanics currently live in the Phoenix/Tucson ADI. What are the demographic characteristics of these residents? Are they young or old? How many are natives of the United States? How long have they lived in the Phoenix/Tucson area? What are their Hispanic backgrounds -- how many are there of Mexican origin/descent, and how many are there of other Hispanic backgrounds? What are their educational levels and occupations? How do they contribute to the economy: what is their average yearly income, and ultimately, their buying power?

The purpose of this section is to profile demographically the strength of the Hispanic community within the Phoenix/Tucson market.

A. COUNTRY OF ORIGIN -- HEAD OF HOUSEHOLD

Mexicans are currently the dominant nationality in the Phoenix/Tucson market, with 95.4% of the Hispanic heads of household being of Mexican origin or descent.

COUNTRY OF ORIGIN
HISPANIC HEAD OF HOUSEHOLD

	Percent
Mexico	95.4%
Central/South America	3.5
Other	1.1
TOTAL	100.0%

Source: Strategy Research Corporation

Households headed by persons from Central/South America represent 3.5% of the market's Hispanic population base.

Of the estimated 1988 Phoenix/Tucson Hispanic population of 583,300 persons, approximately 556,468 reside in households where the head of household is from Mexico or has ancestors from Mexico.

NUMBER OF PERSONS BY COUNTRY OF ORIGIN OF HISPANIC HEAD OF HOUSEHOLD PHOENIX/TUCSON ADI

Head Of Household Country Of Origin Or Descent	Number Of Persons
Mexico	556,468
Central/South America	20,416
Other	6,416
TOTAL	583,300

Source: Strategy Research Corporation

Approximately 20,416 Central/South Americans live in the Phoenix/Tucson area, while persons of other Hispanic origins numerate approximately 6,416.

B. RESIDENCY STATUS

The number of Hispanics who have entered the United States is impressive. But this number does not measure the potential for future immigration to the U.S. from Latin America (Mexico, the Caribbean, South and Central America). Neither the INS nor the Justice Department provide statistics which reflect the true magnitude of this potential.

The figures in the following table present an eloquent comparison between the projected growth of the Latin American population and that of the United States and Canada.

From parity with the U.S. and Canada in 1950, the Latin American population has grown, in 1985, to one and a half times the U.S./Canadian population (405 million versus 264 million). In the year 2005, the Latin American population may be twice that of the U.S. and Canada (780 million versus 365 million, respectively).

POPULATION PRESSURE IN LATIN AMERICA

	Population Latin America	Population U.S./Canada
1950	165 Million	166 Million
1985	405 Million	264 Million
2005	780 Million	345 Million

Source: Population Reference Bureau, Washington, D.C.

The underlying causes for immigration from Latin America to the U.S. have been economic, social and political. These causes remain basically unchanged. The pace of future immigration is likely to reflect this process as well as the increasing population pressure.

The economic situation in Mexico continues to be dim, largely because of the enormous deficit the country is burdened with. The inflation rate in 1987 was roughly 140%.

In January 1988, the Mexican government issued the "Economic Solidarity Pact" with the expressed purpose of curtailing the skyrocketing inflation by having a price/wage freeze. When the freeze is eventually lifted, the economic situation will become more complex.

The minimum daily wage in Mexico is 8,000 pesos, or roughly $4.00 U.S. Many Mexicans look to the United States as the "Land of Opportunity" with aspirations of earning $4.00 an hour. Since many Mexicans only plan on working in the United States on a temporary basis and then returning to their homeland and living comfortably, the prospects of being deported is often not a concern to them.

Because Arizona is contiguous with the country of Mexico, many aspiring Mexicans enter the State and start their new life of opportunity. If the economic situation continues to be dismal south of the border, the influx of Mexicans is seen as a relatively stable fact.

This section reveals several factors regarding the Phoenix/Tucson Hispanics' residency status, both in the United States as well as in the Phoenix/Tucson area. Strategy Research Corporation queried Hispanics with regard to their country of birth, the length of time the head of household has been living in the United States, the length of time he/she has been living in the Phoenix/Tucson area, and the number of times the respondent's place of residence was changed in the past three years.

1. Place Of Birth

Phoenix/Tucson Hispanic heads of household, aged 18+, were asked whether they were born in the United States or some other country.

PLACE OF BIRTH

	Percent
Other Country	55.8%
U.S.A.	44.2
TOTAL	100.0%

Source: Strategy Research Corporation

Less than half (44.2%) of Phoenix/Tucson area Hispanics were born in the United States, while 55.8% of Hispanics were born outside the United States, most notably Mexico.

2. Length Of Residency In The United States

Surveyed Hispanics were asked to state the length of time the head of household has been living in the United States.

The average length of residency in the United States among Phoenix/Tucson Hispanics is 21 years, 6 months.

More than one-third of Hispanic heads of household (36.7%) in the Phoenix/Tucson area have been living in the United States for 30 years or longer. An additional 22.7% have lived in this country for 20-30 years.

LENGTH OF TIME
HEAD OF HOUSEHOLD
HAS BEEN LIVING IN THE UNITED STATES

	Percent
Less Than 1 Year	1.4%
1 - 3 Years	1.2
3 - 5 Years	3.0
5 - 7 Years	5.6
7 - 9 Years	3.5
9 - 11 Years	8.2
11 - 15 Years	6.2
15 - 20 Years	11.5
20 - 25 Years	10.6
25 - 30 Years	12.1
30 Years Or Longer	36.7
TOTAL	100.0%
Average Length Of Residency In U.S.A.	21 Years, 6 Months

Source: Strategy Research Corporation

A total of 5.6% of current Phoenix/Tucson Hispanics stated that they have been in the United States for less than five years, with an additional 9.1% indicating residency from five to nine years.

3. Length Of Residency In The Phoenix/Tucson Area

In addition to being queried with regard to their length of residency in the United States, Phoenix/Tucson Hispanics were asked to state how long the head of household had been living in the Phoenix/Tucson area.

The average length of residency in the Phoenix/Tucson area among Hispanic heads of household is approximately 17 years, 10 months, which is lower than the average longevity in the United States overall.

A total of 2.7% of current Phoenix/Tucson residents are newcomers, as they have resided in the area for less than one year; 4.0% of Hispanics have resided in the area from one to three years. In total, 30.6% of Hispanics have lived in the Phoenix/Tucson area for less than ten years.

LENGTH OF TIME
HEAD OF HOUSEHOLD
HAS BEEN LIVING IN THE PHOENIX/TUCSON AREA

	Percent
Less Than 1 Year	2.7%
1 - 3 Years	4.0
3 - 5 Years	10.0
5 - 7 Years	7.1
7 - 9 Years	6.8
9 - 11 Years	5.1
11 - 15 Years	5.8
15 - 20 Years	12.0
20 - 25 Years	8.8
25 - 30 Years	10.4
30 Years Or Longer	27.3
TOTAL	100.0%
Average Length Of Residency In The Phoenix/Tucson Area	17 Years, 10 Months

Source: Strategy Research Corporation

Over one-fourth of Hispanic heads of household (27.3%) have been residing in the Phoenix/Tucson area 30 years or longer.

4. Change Of Residence

a. Incidence Of Address Change

Strategy Research Corporation also queried respondents as to the number of times that they changed addresses within the past three years.

A total of 41.3% of the survey sample claimed that they had changed addresses within the past three years.

CHANGE OF ADDRESS
PAST THREE YEARS

	Percent
Yes	41.3%
No	58.7
TOTAL	100.0%

Source: Strategy Research Corporation

b. Frequency Of Address Change

All survey individuals who indicated that they had not been residing at the same address for the past three years were asked to state the number of times that they changed addresses within this time frame.

NUMBER OF TIMES
PLACE OF RESIDENCE WAS CHANGED
IN THE PAST THREE YEARS

	Percent
One	40.6%
Two	25.3
Three	21.3
Four Or More	12.8
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 40.6% of the Hispanics interviewed who changed their place of residence in the past three years did so once, while 25.3% changed their place of residence twice. Thirty-four percent of responding Hispanics made three or more address changes within the past three years.

C. HOUSEHOLD SIZE

The following statistics on the number of persons per household affirm a dynamic Hispanic presence. The average number of persons per Hispanic household in the Phoenix/Tucson area is currently estimated at 3.7 persons, which is a very large household size. To illustrate, the average household size for all U.S. Hispanics is 3.5 (*1987 U.S. Hispanic Market Study*, Strategy Research Corporation).

NUMBER OF PERSONS
PER HISPANIC HOUSEHOLD

	Percent
One	5.2%
Two	15.0
Three	13.6
Four	24.0
Five	21.4
Six Or More	20.8
TOTAL	100.0%
Average Number Of Persons Per Household	3.7

Source: Strategy Research Corporation

Approximately one-fifth of the Hispanic households in the Phoenix/Tucson area (20.2%) consist of one or two persons. A total of 13.6% are three-member households, while 24.0% are four-person households.

Households with five or more individuals constitute 42.2% of the Hispanic households in the Phoenix/Tucson area.

D. AGE/SEX DISTRIBUTION

This is a very young market. The average age of the Phoenix/Tucson Hispanic market is 24.5 years, which is similar to the average age for the U.S. Hispanic population as a whole -- 23.6 years (*1987 U.S. Hispanic Market Study*, Strategy Research Corporation).

PHOENIX/TUCSON ADI
HISPANIC AGE/SEX DISTRIBUTION

	Hispanic Population (000)	Percent Distribution
Males 18-24	36.3	6.2%
Males 25-34	51.7	8.9
Males 35-49	38.1	6.5
Males 50-54	8.1	1.4
Males 55-64	16.3	2.8
Males 65+	11.0	1.9
Males 18+	**161.5**	**27.7%**
Females 18-24	36.7	6.3
Females 25-34	52.2	8.9
Females 35-49	41.6	7.1
Females 50-54	9.0	1.5
Females 55-64	18.5	3.2
Females 65+	13.7	2.3
Females 18+	**171.7**	**29.4**
Teens (12 - 17)	**76.4**	**13.1**
Children (0 - 11)	**173.7**	**29.8**
TOTAL	**583.3**	**100.0%**

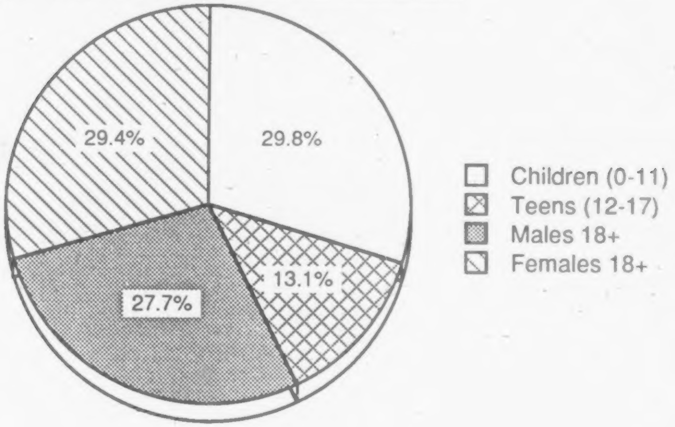
Average Age: 24.5

Source: Strategy Research Corporation

Approximately 42.9% of the Phoenix/Tucson Hispanic market is under 18 years of age, while 30.3% are between the ages of 18 and 34. Only 9.2% of all Hispanics are 55 years of age or older.

Adult males constitute 27.7% of the Hispanic population base, while adult females comprise 29.4% of the population.

PHOENIX/TUCSON
HISPANIC AGE/SEX DISTRIBUTION



Source: Strategy Research Corporation

E. OCCUPATION -- HEAD OF HOUSEHOLD

The Phoenix/Tucson market area is Arizona's largest job center. Due in part to Arizona's reasonable tax rates and labor laws, Phoenix, over the past several years has shown an impressive economic expansion. This success has been notable in the areas of job generation, new business creation and the growth of young companies.

Approximately one-fourth of Hispanic heads of household (24.9%) are currently employed in white collar jobs as professionals, managers, owners, or in technical, clerical or sales positions.

OCCUPATION
HEAD OF HOUSEHOLD

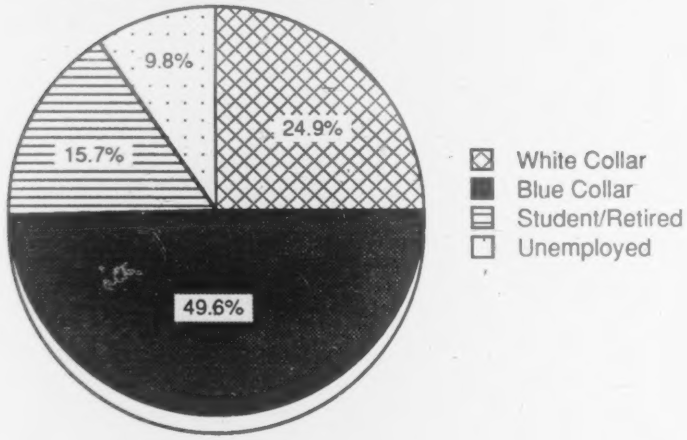
Occupation	Percent
White Collar	
Professional/Manager/ Owner/Technical/ Clerical/Sales	24.9%
Blue Collar	
Craftsmen/Operatives/ Service Workers/ Laborers/Farmers	49.6
Other	
Retired/Students/Military/ Disabled	15.7
Unemployed	9.8
TOTAL	100.0%

Source: Strategy Research Corporation

One-half of Hispanics (49.6%) are also employed in blue collar jobs as craftsmen, operatives, service workers, laborers or farmers.

A total of 15.7% of Phoenix/Tucson Hispanics are retired/students/disabled or in the military. There is one major military installation in the market area -- Davis-Monthan Air Force Base -- in Tucson.

OCCUPATION
HEAD OF HOUSEHOLD



Source: Strategy Research Corporation

Phoenix is the corporate headquarters for numerous major national employers including Circle K Corporation, Greyhound Corporation, Ramada Inns, Inc., SupeRx Drugs, Swensen's Ice Cream Company, U-Haul International, et. al.

High technology is Tucson's largest industry. The market's top two manufacturers are Hughes Aircraft, which produces missiles and components (employment -- 8,000) and IBM, which manufactures computer products (employment -- 5,500). There are several other large-scale manufacturers in the Tucson area which employ well over 1,000 individuals such as AiResearch (Garrett Corporation), Burr Brown Corporation and Krueger Division/Phillips Industries. The former two corporations manufacture electronic goods, while the latter manufactures air ventilation products.

A total of 9.8% of Hispanics are currently unemployed.

F. FULL-TIME EMPLOYMENT

1. Number Of Household Members Employed

Currently there are an average of 1.3 persons employed full-time per Hispanic household in the Phoenix/Tucson area. This figure compares favorably with that of Hispanics in New York, where 1.3 members per Hispanic household are also employed on a full-time basis.

PERSONS EMPLOYED
FULL-TIME IN HOUSEHOLDS

	Percent	
Employed Full-Time	82.1%	
One Person		47.2%
Two Persons		26.7
Three Persons		5.1
Four Persons		2.1
Five Persons Or More		1.0
No One Employed Full-Time	17.9	
TOTAL	100.0%	82.1%
Average Number Of Persons Employed Full-Time Per Household		1.3

Source: Strategy Research Corporation

Presently, almost half of Hispanic households (47.2%) have one member employed on a full-time basis, while 26.7% have two members who are employed full-time.

Eight percent of the Hispanic households are comprised of three or more family members who work on a full-time basis.

2. Female Full-Time Employment

All survey participants were also asked if there were any females present in their household who work full-time.

Currently, 35.9% of Hispanic households in the Phoenix/Tucson market area have at least one female present who works outside the home on a full-time basis.

NUMBER OF FEMALES
EMPLOYED FULL-TIME IN HOUSEHOLDS

	Percent
Yes	35.9%
No	64.1
TOTAL	100.0%

Source: Strategy Research Corporation

This is an impressive percentage of female employment, indicative of the continuing increase of women into the labor force. Traditionally, Hispanic women have taken on the role of homemaker, thus requiring them to stay at home.

G. LEVEL OF EDUCATION -- HEAD OF HOUSEHOLD

All heads of household were asked about the last level of school completed.

Over one-half of Hispanic adult heads of household (51.0%) obtained an elementary or junior high school education. In Mexico it is mandatory under governmental decree for residents to obtain a sixth grade education, *primaria,* in order to have gainful employment. Given the opportunity for continuing education here in the United States posed a problem; namely, a language barrier existed along with an unfamiliarity with the system.

A total of 35.4% of Hispanic adults completed high school or *bachillerato*[1].

LEVEL OF EDUCATION
HEAD OF HOUSEHOLD

	Percent
Elementary/Junior High School	51.0%
High School/ Bachillerato	35.4
Technical School	0.5
College	9.4
No Schooling	3.7
TOTAL	100.0%

Source: Strategy Research Corporation

As regards college education, 9.4% of Hispanics have completed some college or are college graduates. Phoenix is the home of Arizona State University, while Tucson is the home of the University of Arizona.

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[1] A bachillerato differs from traditional domestic education in that it is a 5-year program.

H. HOUSEHOLD INCOME

Hispanics contribute vigorously to the Phoenix/Tucson economy. The average annual household income in 1988 among Phoenix/Tucson Hispanics is $21,246.

Components of income include earnings from wages, tips and self-employment, interest, dividends, alimony and child support payments, Social Security, public assistance, and other sources.

MEAN AVERAGE
HOUSEHOLD INCOME
1988

	Hispanic
Mean Average Annual Income	$21,246

Source: Strategy Research Corporation

The next sub-section illustrates how this average household income figure translates into an impressive level of spending power.

I. HISPANIC BUYING POWER

In the Phoenix/Tucson market, there are an estimated 159,000 households headed by Hispanics. Taking as a basis the mean average household income, the aggregate gross income is $3.38 billion. The net income (reflecting buying power) is $2.97 billion. This figure was adjusted to be comparable with Market Statistics' *Survey of Buying Power*.

1988
HISPANIC BUYING POWER

$2.97 Billion

Source: Strategy Research Corporation

This figure represents an impressive buying power and is approximately equal to the current GNP for Iceland as well as Luxembourg.

With the continuing influx of Hispanics into the Phoenix/Tucson area, the purchasing power of Hispanics as a group will increase. In addition, Phoenix/Tucson Hispanics are, by and large, young people. Per capita earnings will thus tend to increase on a year-to-year basis, further reinforcing the buying power of the area's Hispanic community.

IV. LANGUAGE PATTERNS

Language usage represents a key determinant in the acculturation and adaptation of arrivals to a new country. It is also inextricably woven into one's culture and traditions.

In order to provide meaningful insight into the patterns of language use in the Phoenix/Tucson area, Hispanics were asked a series of questions regarding:

- The First Language Learned To Speak
- The Ability To Speak/Read/Write Spanish And English
- Which Language Is Spoken Most Frequently At Home/Work/On Social Occasions

To see if the Phoenix/Tucson market is responsive toward the need for language skills, respondents were also asked the degree of importance they placed on their children's ability to read and write both Spanish and English.

A. FIRST LANGUAGE SPOKEN

Strategy Research Corporation asked all survey participants which language they first learned to speak.

For most, the first language spoken is the language which is preserved throughout one's lifetime. It represents a cultural bond with that person's heritage.

Almost nine out of ten Hispanics presently residing in the Phoenix/Tucson area first learned to speak Spanish (88.4%).

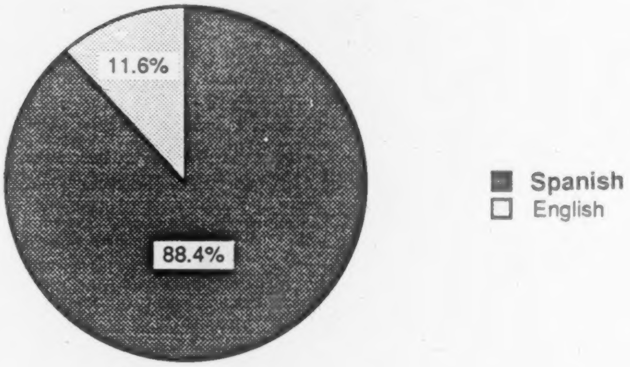
LANGUAGE FIRST LEARNED TO SPEAK

	Percent
Spanish	88.4%
English	11.6
TOTAL	100.0%

Source: Strategy Research Corporation

Thus, just slightly more than one out of ten Hispanics (11.6%) first spoke English in the home.

FIRST LANGUAGE LEARNED TO SPEAK



Source: Strategy Research Corporation

B. SPEAKING ABILITY -- SPANISH/ENGLISH

Survey respondents were queried regarding their present ability to speak both the Spanish and English languages. Selection from a 6-point rating scale which included the options -- very well, well, fair, poor, very poor, can't speak -- yielded quite interesting results.

A total of 86.9% of the Hispanic adults interviewed in the Phoenix/Tucson area indicated that they spoke Spanish very well or well. In direct contrast, only 1.9% stated that they spoke the language poor/very poor or not at all.

ABILITY TO SPEAK SPANISH/ENGLISH

	Spanish	English
Very Well/Well	86.9%	54.8%
Fair	11.2	25.8
Poor/Very Poor	1.4	9.9
Can't Speak	0.5	9.5
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

With regard to the English language, just over half of the Hispanics (54.8%) rated their English language speaking ability as very well/well. An additional 25.8% stated that they were only fairly able to converse in English. An estimated 9.5% of area adults cannot speak English at all.

C. READING ABILITY -- SPANISH/ENGLISH

Hispanics were also asked about their ability to read Spanish and English. Again, they were asked to utilize the 6-point rating scale (very well, well, fair, poor, very poor, can't read).

Three-fourths of Phoenix/Tucson Hispanics (75.5%) read Spanish very well/well. Only 4.9% of Hispanic adults cannot read Spanish at all.

ABILITY TO READ SPANISH/ENGLISH

	Spanish	English
Very Well/Well	75.5%	51.9%
Fair	12.2	21.9
Poor/Very Poor	7.4	12.7
Can't Read	4.9	13.5
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Just over half of the Hispanics interviewed (51.9%) possess the ability to read English proficiently (very well/well). Twenty-two percent of the respondents stated that they read English on a fair basis, while 12.7% indicated that their English language reading ability deserved a poor/very poor rating. A total of 13.5% of the Hispanic adults interviewed in the Phoenix/Tucson area are not able to read English at all.

D. WRITING ABILITY -- SPANISH/ENGLISH

The proficiency of writing Spanish and English was measured in the same manner as the ability to speak and read these languages. Namely, Hispanics were asked to rate their Spanish and English writing abilities by using a 6-point scaling system (very well, well, fair, poor, very poor, can't write).

The ability to write Spanish is similar to the ability of reading it. That is, 74.7% of the Hispanics interviewed commented that they were able to write Spanish very well/well (Spanish language reading ability received mentions of 75.5% on this "top two box" score).

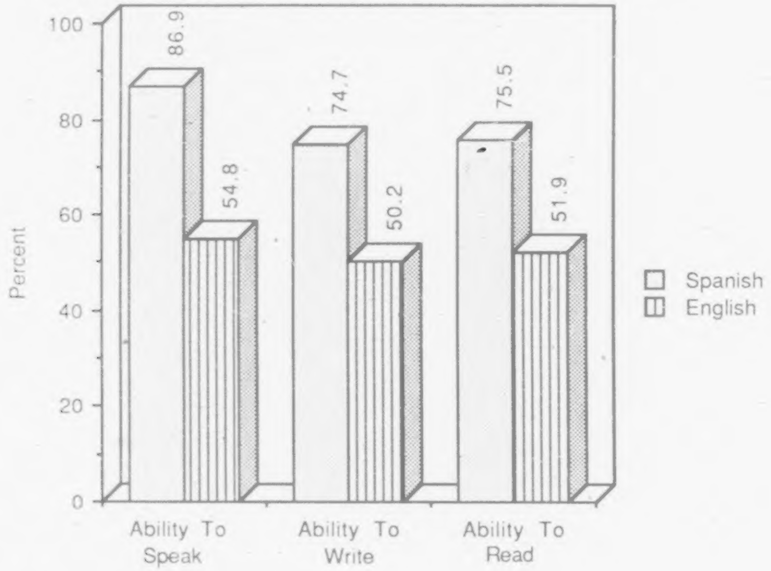
ABILITY TO WRITE SPANISH/ENGLISH

	Spanish	English
Very Well/Well	74.7%	50.2%
Fair	13.8	23.2
Poor/Very Poor	6.4	14.0
Can't Write	5.1	12.6
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Similarly, the ability to write English is at par with the ability of speaking and reading it. Specifically, a total of 50.2% of the Hispanic adults interviewed stated that they were able to write English very well/well. Just under one-fourth (23.2%) rated their English writing ability as fair, while 14.0% rated themselves poor/very poor on this attribute.

Language Ability By "Very Well"/"Well" Responses



Source: Strategy Research Corporation

E. LANGUAGE SPOKEN AT HOME, WORK, AND ON SOCIAL OCCASIONS

The following is a summary of the language spoken most frequently by Hispanics in the Phoenix/Tucson area at various times.

Spanish is spoken most frequently by Phoenix/Tucson Hispanics at home (60.7%) and on social occasions (49.9%). It is spoken, although to a lesser degree, by Hispanics in the work environment (25.5%).

LANGUAGE SPOKEN MOST FREQUENTLY BY PHOENIX/TUCSON HISPANICS AT VARIOUS TIMES

Language Spoken	At Home	At Work	On Social Occasions
Spanish	60.7%	25.5%	49.9%
English	12.7	33.4	11.6
Both	26.6	41.1	38.5
TOTAL	100.0%	100.0%	100.0%

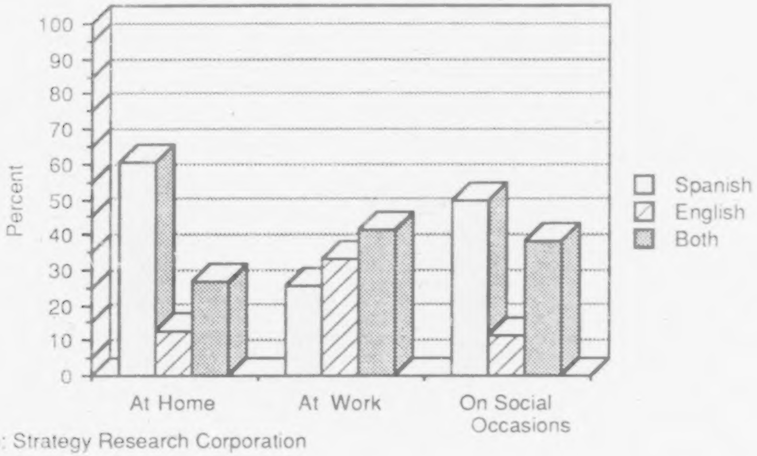
Source: Strategy Research Corporation

Even though the average length of residency of the Phoenix/Tucson community is close to 18 years, the language spoken most frequently in the home is still Spanish. As stated earlier, there are currently approximately 159,000 Hispanic households in the Phoenix/Tucson area. Thus, Spanish is the language spoken most frequently in approximately 96,513 homes.

Whereas 60.7% of Hispanics speak Spanish most frequently in the home, another 26.6% speak both Spanish and English. Thus, the combined total of Spanish language usage in the home among Phoenix/Tucson Hispanics is 87%.

Phoenix/Tucson Hispanics are culturally affixed to their heritage. In this regard, a high percentage also speak Spanish on social occasions.

LANGUAGE SPOKEN MOST FREQUENTLY



Source: Strategy Research Corporation

F. ATTITUDES REGARDING LANGUAGE

In order to determine whether the Phoenix/Tucson Hispanic market is responsive toward the need for language skills, survey participants were asked the following two questions:

1. "How important is it to you that your children have the ability to read and write Spanish perfectly?"

2. "How important is it to you that your children have the ability to read and write English perfectly?"

The possible options were:

- Very Important
- Somewhat Important
- Neither Important Nor Unimportant
- Not Very Important
- Not At All Important

1. Spanish

A total of 94.3% of the Hispanics participating in the survey feel that it is "very important" for their children to read and write Spanish perfectly.

IMPORTANCE OF CHILDREN READING AND WRITING SPANISH PERFECTLY

	Percent
Very Important	94.3%
Somewhat Important	3.6
Neither Important Nor Unimportant	1.8
Not Very Important	0.3
Not Important At All	0.0
TOTAL	100.0%

Source: Strategy Research Corporation

An additional 3.6% of Hispanics also feel that it is "somewhat important" for their children to read and write Spanish with perfection. Thus, 97.9% of Hispanics feel that it is "very/somewhat important" to master the Spanish language.

2. English

Hispanics place a great deal of importance on their children mastering English language skills. A total of 98.0% of Hispanic adults stated that it was "very/somewhat important" that the next generation be able to read and write English with a high degree of proficiency.

IMPORTANCE OF CHILDREN READING AND WRITING ENGLISH PERFECTLY

	Percent
Very Important	94.9%
Somewhat Important	3.1
Neither Important Nor Unimportant	1.3
Not Very Important	0.7
Not Important At All	0.0
TOTAL	100.0%

Source: Strategy Research Corporation

The following section will compare social attitudes among Phoenix/Tucson Hispanics.

V. SOCIAL ATTITUDES

In order to gain an even better understanding of the Hispanics which comprise a particular market, Strategy Research Corporation has established a series of scaled statements which provide a reliable measure of the attitudes of Hispanics to certain aspects of their culture.

Respondents are presented with a series of affirmations. They are asked to state the extent of their agreement with each affirmation, utilizing a 5-point rating scale. The individual points on the scale are:

- Completely Agree
- Somewhat Agree
- Neither Agree Nor Disagree
- Somewhat Disagree
- Completely Disagree

The results of the scaled opinions are shown by "completely agree/somewhat agree" (top two box) responses.

Hispanics in the Phoenix/Tucson area present an impressive image with regard to their family and culture. In this regard, traditions have played a major role in shaping the area's present-day Hispanic community.

To an exceptional degree, Hispanics agreed emphatically with the affirmation, "It's Important To Get Together With Family Frequently On Social Occasions" (92.8%) and "I Am Proud To Be Hispanic And I Think Our Culture/Traditions Should Be Preserved And Kept" (87.0%).

Another affirmation which emerged as a characteristic Hispanic trait was that expressed in the statement, "I Like To Listen To Latin Music," endorsed by 89.0% of the Hispanics interviewed.

Eighty-seven percent of all Hispanic adults interviewed also place importance on speaking the Spanish language at home, and 74.0% also prefer to live in a Hispanic neighborhood.

RANKING OF SOCIAL ATTITUDES
"COMPLETELY/SOMEWHAT AGREE"

	Percent
It's Important To Get Together With Family Frequently On Social Occasions	92.8%
I Like To Listen To Latin Music	89.0
I Am Proud To Be Hispanic And I Think Our Culture/Traditions Should Be Preserved And Kept	87.0

Continued. . .

RANKING OF SOCIAL ATTITUDES
"COMPLETELY/SOMEWHAT AGREE"
(CONTINUED)

	Percent
It Is Important That My Family Speak Spanish At Home	86.7%
I Think That It Is Important To Vote During Elections	81.2
I Like To Listen To American Music	76.2
I Prefer Living In A Hispanic Neighborhood	74.0
Nationally Advertised And Popular Name Brands Are The Best Products For My Family	70.5
When I Go To A Store I Want The Salesperson To Understand Me In Spanish	67.9
The Popular Name Brands I Use Most Often Today Are Going To Be The Same Brands I Will Be Using Next Year	63.3

Source: Strategy Research Corporation

The fifth most agreed upon statement concerns an interesting aspect of acculturation. Eight out of ten Phoenix/Tucson Hispanics (81.2%) agreed with the statement, "I Think That It Is Important To Vote During Elections." Slightly over three-fourths of Hispanics (76.2%) also agreed with the statement, "I Like To Listen To American Music."

An aspect of shopping considered important by more than two-thirds of Hispanics was that of being attended to by a Spanish-speaking salesperson. A total of 67.9% agreed with the affirmation concerning this preference. Hispanics are much more comfortable when they can establish a personal relationship, even when making a purchase.

Hispanics also prefer brand name merchandise. A total of 70.5% of Hispanics concur in the preference for popular, nationally-advertised brands for themselves and their families, while 63.3% indicate a strong sense of brand loyalty in that they plan on using the same brands tomorrow as they are using today.

These findings have relevance in two areas. First, they show that the majority of Hispanics in the Phoenix/Tucson area clearly manifest and reaffirm their identity as a Hispanic community. Second, as can be seen with time and influence, Hispanics in Phoenix/Tucson have developed a bi-cultural personality.

VI. SHOPPING PATTERNS

Phoenix/Tucson Hispanics were asked to indicate which types of food stores they patronize, the-one which they shop at most frequently, and specifically, to cite the name of that particular store. Average weekly food store expenditures were also measured.

The survey also focused on the recent patronage of convenience stores, pharmacies/drug stores, department stores, and discount outlets.

Past month visitation of enclosed shopping malls was also a point of query, as well as the various retail outlets shopped for three select types of consumer goods.

A. FOOD STORE PATRONAGE

1. Types Of Stores Patronized

Survey respondents were initially asked by the interviewer, "I am going to read you a list of some different types of food stores. For each one that I mention, I would like you to tell me if you have made any purchases at that particular type of store within the past month."

A chain supermarket is classified as one which has at least six check-out counters, while a neighborhood grocery store has approximately one to three check-outs. In addition, a chain supermarket has at least three to five stores in the same area.

Virtually all Hispanics in the Phoenix/Tucson area patronize large chain supermarkets (95.2%).

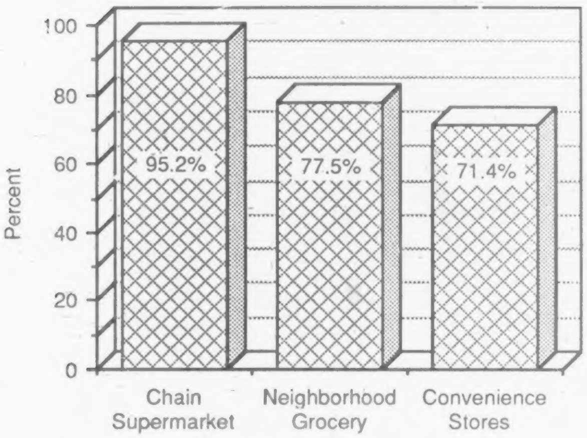
FOOD STORES PATRONIZED
PAST MONTH

	Percent
Chain Supermarket	95.2%
Neighborhood Grocery Store	77.5
Convenience Store	71.4

Source: Strategy Research Corporation

More than three-fourths of Phoenix/Tucson Hispanics (77.5%) made purchases at one or more of their neighborhood grocery stores, and just slightly less (71.4%) also patronized at least one convenience store in the past month.

FOOD STORE PATRONAGE



Source: Strategy Research Corporation

2. Primary Type Of Store Shopped

After obtaining the levels of patronage for the three different types of food outlets, respondents were asked to indicate the one which they shop at most frequently.

Hispanics in the Phoenix/Tucson area primarily shop at the larger chain supermarkets (73.9%).

TYPE OF FOOD STORE
PATRONIZED MOST FREQUENTLY

	Percent
Chain Supermarket	73.9%
Neighborhood Grocery Store	24.2
Convenience Store	1.9
TOTAL	100.0%

Source: Strategy Research Corporation

Approximately one-fourth of Hispanics (24.2%) patronize the neighborhood grocery store.

Convenience stores are the primary store for 1.9% of the Hispanics interviewed.

3. Food Stores Recently Patronized

All survey participants were asked to name the food store(s) which they patronized in the past month.

Overall, Hispanics in the Phoenix/Tucson area shop a variety of food stores within Phoenix as well as in Tucson.

Fry's dominates the supermarket chain store market overall. Slightly more than one-half (51.2%) of all Phoenix/Tucson Hispanics recently shopped at Fry's. A total of 43.3% of the Hispanics in Phoenix patronized Fry's in the past month, as did 67.2% of Hispanics in Tucson.

Following Fry's is Smitty's with total mentions of 38.5%. Smitty's was patronized by half of the Hispanics in Phoenix (50.3%); 14.3% of the Hispanics in Tucson recently shopped at Smitty's.

These two supermarket chains (Fry's and Smitty's) are the two most patronized stores among Hispanics. Not only are they two of the biggest chains in the Phoenix/Tucson area, they also do extensive advertising in Spanish.

FOOD STORES PATRONIZED
PAST MONTH

	Total	Phoenix	Tucson
Fry's	51.2%	43.3%	67.2%
Smitty's	38.5	50.3	14.3
Lucky	18.3	6.3	42.7
Safeway	15.5	12.3	22.0
Bayless	11.4	7.6	18.9
Southwest Supermarket	10.0	14.6	0.8
Sure-Save	9.2	11.9	3.8
ABCO	8.3	8.2	8.5
Food City	7.6	11.3	--
Others	11.3	13.8	6.6
TOTAL	*	*	*

* Multiple Response

Source: Strategy Research Corporation

Lucky, with an overall shopping rate of 18.3%, is the third most frequented food store, followed by Safeway which was mentioned by 15.5% overall. Both these stores received a greater percentage of mentions by Hispanics in Tucson than those in Phoenix. Specifically, 42.7% of the Hispanics in Tucson stated that they patronized Lucky in the past month, compared to 6.3% of the Hispanics in Phoenix who responded similarly. Safeway was mentioned by 22.0% of the Hispanics in Tucson and by 12.3% of the Hispanics in Phoenix.

4. Weekly Food Store Expenditures

All respondents were asked approximately how much they spent weekly on purchases made for the whole family in all the different types of food stores.

AVERAGE WEEKLY
FOOD STORE EXPENDITURES

	Hispanic Households
1988	$86.59

Source: Strategy Research Corporation

The average weekly expenditure for Hispanic households at all food stores is currently $86.59.

B. CONVENIENCE STORE PATRONAGE

To further define convenience store patronage, respondents were asked if they had been to a convenience store within the past week, and if so, to indicate the number of times they patronized such a store within the specified time frame.

1. Recent Visitation

Survey respondents were asked, "In the past week, have you been to any convenience store?"

CONVENIENCE STORE VISITATION
PAST WEEK

	Percent
Yes	59.8%
No	40.2
TOTAL	100.0%

Source: Strategy Research Corporation

Approximately six out of ten Hispanics (59.8%) had been to at least one convenience store with the past seven day time period.

2. Frequency Of Patronage

Hispanics indicating that they had recently been to at least one convenience store were asked to state the number of times they patronized quick-serve stores in the past week.

Convenience store patronage is high. On average, Hispanics patronized one or more convenience stores approximately 2.6 times in the past week.

CONVENIENCE STORE PATRONAGE
PAST WEEK FREQUENCY

Number Of Times	Percent
One	20.5%
Two	37.0
Three	20.9
Four	12.3
Five	3.4
Six Or More	5.9
TOTAL	100.0%
Average Times Per Week	2.6

Source: Strategy Research Corporation

One-fifth of Hispanics (20.5%) shopped at a convenience store once within the past seven days, while 37.0% shopped these outlets twice. An additional 20.9% patronized a convenience store three times, and 12.3% made at least four purchases.

A total of 8.9% of Hispanics patronized a convenience store in the past week five or more times.

C. PHARMACY/DRUG STORE PATRONAGE

All Hispanics were asked if they patronized a pharmacy/drug store in the past month, and to name those pharmacies or drug stores which they indeed patronized.

1. Incidence Of Patronage

Survey participants were asked, "In the past month, have you bought any type of merchandise in a pharmacy or drug store?"

In reply, a total of 82.4% of the respondents responded in the affirmative.

PHARMACY/DRUG STORE PATRONAGE
PAST MONTH

	Percent
Yes	82.4%
No	17.6
TOTAL	100.0%

Source: Strategy Research Corporation

2. Pharmacies/Drug Stores Recently Patronized

Hispanics who indicated recent pharmacy/drug store patronage were asked, "Which pharmacies or drug stores have you patronized in the past month?"

Whether it be for prescriptions or for any other type of merchandise purchase, Hispanics in the Tucson area patronize Walgreens most frequently. This national drug store chain was mentioned by 71.7% of the responding Hispanics in Tucson; a 28.0% level was recorded among Hispanics in Phoenix.

Revco is the second most popular pharmacy/drug store among Tucson's Hispanics as one-half (50.1%) visited Revco at least once in the previous month. One-fourth of the Hispanics in Phoenix (24.5%) patronized Revco.

PHARMACIES/DRUG STORES
PATRONIZED WITHIN THE PAST MONTH

	Total	Phoenix	Tucson
Walgreens	43.1%	28.0%	71.7%
Revco	33.4	24.5	50.1
Thrifty	27.7	36.2	11.4
SupeRx	14.1	19.7	3.4
Others	19.2	29.1	4.9
TOTAL	*	*	*

* Multiple Response

Source: Strategy Research Corporation

More than one-third of the responding Hispanics in Phoenix (36.2%) stated that they had patronized Thrifty Drug Store in the past month, ranking it first among Hispanics in this market area.

SupeRx Drugs was patronized by 19.7% of the Hispanics in Phoenix and by 3.4% of the Hispanics in Tucson.

Thus, the data indicates that Hispanics in Phoenix shop a greater variety of pharmacies/drug stores than do Hispanics in Tucson.

D. OTHER RETAIL OUTLETS SHOPPED

All Hispanics participating in the survey were also asked if they had bought any type of merchandise at either a department store or a discount store in the past month.

A total of 70.9% of all Hispanics interviewed in the Phoenix/Tucson area affirmed purchasing consumer goods at a discount store such as a Walmart or K-mart in the past month.

PAST MONTH PATRONAGE

	Percent
Discount Store	70.9%
Department Store	52.5

Source: Strategy Research Corporation

More than half of all Hispanics interviewed (52.5%) also affirmed patronage at a local area department store be it Sears, JC Penney, Mervyn's, Dillard's, Broadway Southwest, etc.

In the next section, the type of stores patronized for specific types of household goods is presented.

E. RETAIL OUTLETS SHOPPED FOR SELECT PRODUCTS

This section of the Report analyzes the various different types of stores shopped for select household items. Do Hispanics patronize one type of store over another for certain items? The products under survey include:

* Major Household Appliances
* Smaller Household Appliances
* Indoor Furniture

Hispanics were also asked to cite the type of store where they usually purchase these types of consumer goods.

1. Major Household Appliances

a. Incidence Of Purchase

"Big Ticket" items such as major household appliances show a high rate of purchase among Phoenix/Tucson Hispanics.

INCIDENCE OF PURCHASE
MAJOR APPLIANCES

	Percent
Yes	87.3%
No	12.7
TOTAL	100.0%

Source: Strategy Research Corporation

Almost nine out of ten Hispanics (87.3%) indicated purchase of major household appliances such as refrigerators, ovens, dishwashers, televisions, etc.

b. Types Of Stores Shopped

Appliance stores are frequented by more than one-third of Hispanics when major household appliances are required. That is, 37.2% of Phoenix/Tucson Hispanics who purchase major appliances will shop a store specializing in appliances when in need of a television, stereo, refrigerator, washing machine/dryer, etc.

TYPE OF STORE
WHERE MAJOR APPLIANCES ARE PURCHASED

	Percent
Appliance Store	37.2%
Discount Store	27.8
Department Store	24.0

Source: Strategy Research Corporation

Almost three out of ten Hispanics (27.8%) will also shop for major appliances in a discount store such as Walmart or K-mart, while department stores such as Sears and JC Penney are shopped at by 24.0%.

2. Smaller Household Appliances

a. Incidence Of Purchase

A similar percentage of Hispanics who purchase major household appliances also purchase smaller household appliances. The latter category includes such items as blenders, toasters, coffee makers, electric can openers, food processors, etc.

INCIDENCE OF PURCHASE
SMALLER APPLIANCES

	Percent
Yes	87.3%
No	12.7
TOTAL	100.0%

Source: Strategy Research Corporation

Specifically, a total of 87.3% of Hispanics interviewed stated that they purchase smaller household goods either for their own home use or for gifts.

b. Types Of Stores Shopped

Respondents indicating the purchase of smaller household appliances were asked to name the type of store they usually shop for these types of consumer durables.

For the most part, smaller household appliances are purchased most often in specialty stores. Almost four out of ten Hispanics (38.9%) are apt to patronize an appliance store than another type of retail location.

TYPE OF STORE
WHERE SMALLER APPLIANCES ARE PURCHASED

	Percent
Appliance Store	38.9%
Discount Store	31.2
Department Store	22.3

Source: Strategy Research Corporation

Walmart, K-mart and other such discount stores are the second most popular source of smaller appliance purchases (31.2%), while department stores (JC Penney, Dillard's, etc.) are visited by 22.3% of Phoenix/Tucson Hispanic adults.

3. Indoor Furniture

a. Incidence Of Purchase

When asked if they ever purchase any type of indoor furniture, a total of 86.7% of the Hispanics interviewed replied in the affirmative.

INCIDENCE OF PURCHASE
INDOOR FURNITURE

	Percent
Yes	86.7%
No	13.3
TOTAL	100.0%

Source: Strategy Research Corporation

b. Types Of Stores Shopped

Furniture stores are more than twice as popular than other types of stores when it comes to the purchase of furniture for the home. Specifically, more than half of Hispanics (56.2%) would shop a furniture showroom such as Ethan Allen or Levitz, while 20.2% would turn to a discount store, and 16.8% would shop for indoor furniture in a department store.

TYPE OF STORE
WHERE INDOOR FURNITURE IS PURCHASED

	Percent
Furniture Store	56.2%
Discount Store	20.2
Department Store	16.8

Source: Strategy Research Corporation

The next sub-section presents data with regard to general patronage at shopping malls.

F. SHOPPING MALLS

Within the Phoenix/Tucson area there are several shopping malls catering to the consumer. For example, some popular enclosed malls in the Phoenix area include Metro Center, Paradise Valley Mall, Valley West Mall, and Los Arcos. In Tucson, the area's four main enclosed shopping malls are Tucson Mall, Foothills Mall, El Con Mall, and Park Mall. In effect, retail outlets located in these malls offer the consumer a wide selection of merchandise product categories. How often do Hispanics in the Phoenix/Tucson area frequent these enclosed shopping malls - whether it be to patronize the larger anchor stores or the smaller specialized boutiques?

1. Recent Visitation

All survey participants were asked whether they had been to an enclosed shopping mall within the past month.

ENCLOSED SHOPPING MALLS
PAST MONTH PATRONAGE

	Percent
Yes	45.3%
No	54.7
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 45.3% of the Hispanics interviewed indicated recent visitation of at least one enclosed shopping mall.

2. Frequency Of Visitation

All Hispanics affirming visitation to an enclosed shopping mall within the past month were asked to state the number of times that they had been to these type of concentrated retail locations within the specified time frame.

Visitation of enclosed shopping malls is frequent. On average, Hispanics who patronize enclosed shopping malls do so approximately 2.2 times per month.

ENCLOSED SHOPPING MALLS
FREQUENCY OF VISITATION
PAST MONTH

	Percent
One	30.0%
Two	44.1
Three	15.2
Four	3.9
Five	2.3
Six Or More	4.5
TOTAL	100.0%
Average Visits Per Month	2.2

Source: Strategy Research Corporation

Thirty percent of the responding Hispanics (30.0%) indicated one such visit during the past month, while an additional 44.1% stated that they had been to an enclosed mall twice. A total of 15.2% of Hispanics went to an enclosed shopping mall three times, while 10.7% paid these malls four or more visits.

In the next section, the patronage of various types of fast food restaurants is presented.

VII. FAST FOOD RESTAURANT PATRONAGE

This section of the Report presents data with regard to the patronage by Hispanics of four popular types of fast food restaurants:

- Hamburger
- Chicken
- Pizza
- Mexican Food

For each type of fast food restaurant, the respondent was asked, "How often do you or any other member of your family eat at or buy food to take out at a fast food hamburger/chicken/pizza/Mexican restaurant?"

Of the four fast food restaurants in question, the most frequented is the hamburger type. A total of 86.6% of Phoenix/Tucson Hispanics eat at or take food from fast food hamburger restaurants; on average, patronage approximates almost once a week.

More than eight out of ten Hispanics also patronize fast food chicken and pizza restaurants, with an average visitation rate of over twice a month for each type.

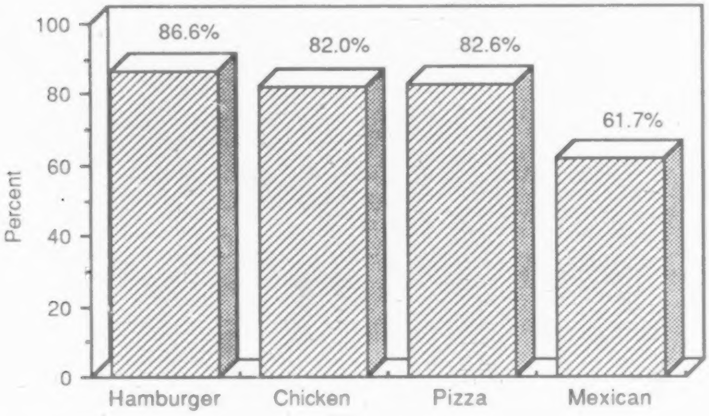
FAST FOOD CONSUMPTION
INCIDENCE AND FREQUENCY

	Yes, Consume	Average Times/Month
Hamburger	86.6%	3.8
Chicken	82.0	2.4
Pizza	82.6	2.2
Mexican	61.7	1.3

Source: Strategy Research Corporation

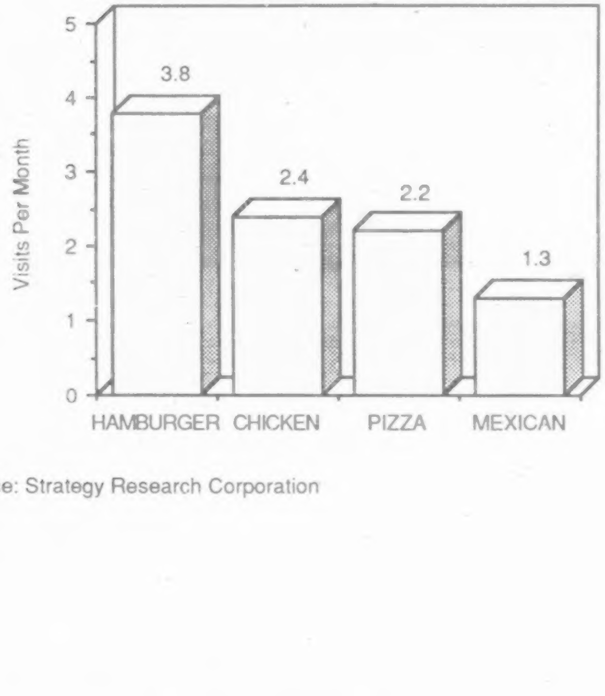
Almost two-thirds of Hispanics (61.7%) patronize fast food Mexican restaurants. Hispanics in the Phoenix/Tucson area eat at or take food from Mexican fast food restaurants approximately 1.3 times in an average month.

INCIDENCE OF FAST FOOD CONSUMPTION



Source: Strategy Research Corporation

FAST FOOD RESTAURANTS AVERAGE NUMBER OF VISITS PER MONTH



Source: Strategy Research Corporation

1. Hamburger Fast Food Restaurants

Eating at fast food hamburger restaurants is very popular among Hispanics in the Phoenix/Tucson area.

On average Hispanics visit fast food hamburger restaurants, either to eat at or take food from, 3.8 times per month.

A total of 86.6% of the Hispanics interviewed stated that fast food hamburger restaurants such as McDonald's, Wendy's, Jack-In-The-Box, Whataburger, and Burger King are patronized by family members.

FREQUENCY OF PATRONAGE
FAST FOOD HAMBURGER RESTAURANTS

	Percent	
Ever Visit	86.6%	
Five Or More Times A Week		5.1%
3-4 Times A Week		3.1
Twice A Week		10.4
Once A Week		23.1
Three Times A Month		4.0
Twice A Month		12.2
Once A Month		18.4
Less Than Once A Month		10.3
Never Visit	13.4	
TOTAL	100.0%	86.6%
Average Number Of Times Per Month	3.8	

Source: Strategy Research Corporation

Overall, four out of ten Hispanics (41.7%) eat at fast food hamburger restaurants at least once a week.

2. Chicken Fast Food Restaurants

The incidence of eating at or taking food from a fast food chicken restaurant registers slightly under the level recorded for that of fast food hamburger restaurants. That is, 82.0% of Phoenix/Tucson Hispanics patronize chicken fast food restaurants such as Kentucky Fried Chicken or Church's.

In an average month, Phoenix/Tucson Hispanics visit fast food chicken restaurants approximately 2.4 times.

FREQUENCY OF PATRONAGE
FAST FOOD CHICKEN RESTAURANTS

	Percent	
Ever Visit	82.0%	
Five Or More Times A Week		1.4%
3-4 Times A Week		2.2
Twice A Week		3.2
Once A Week		13.5
Three Times A Month		18.1
Twice A Month		13.5
Once A Month		16.2
Less Than Once A Month		13.9
Never Visit	18.0	
TOTAL	100.0%	82.0%
Average Number Of Times Per Month	2.4	

Source: Strategy Research Corporation

Chicken fast food restaurants are frequented more than once a week by 6.8% of Hispanics. Furthermore, 13.5% of Hispanics frequent chicken type fast food restaurants once a week. Thus, heavy patronage (at least once a week) among Phoenix/Tucson Hispanics registers at 20.3%.

An additional 18.1% of Hispanics eat at or take food from chicken fast food restaurants approximately three times per month, while 13.5% do so about once every two weeks.

3. Pizza Fast Food Restaurants

Fast food pizza is equally as popular among Phoenix/Tucson Hispanics as is fast food chicken. Specifically, 82.6% of Hispanics interviewed stated that either they themselves and/or some other household member eat from fast food pizza restaurants.

On average, Hispanics in the Phoenix/Tucson area patronize fast food pizza restaurants such as Domino's or Peter Piper Pizza approximately 2.2 times per month.

FREQUENCY OF PATRONAGE
FAST FOOD PIZZA RESTAURANTS

	Percent	
Ever Visit	82.6%	
Five Or More Times A Week		0.6%
3-4 Times A Week		2.5
Twice A Week		4.3
Once A Week		12.3
Three Times A Month		8.7
Twice A Month		17.1
Once A Month		22.5
Less Than Once A Month		14.6
Never Visit	17.4	
TOTAL	100.0%	82.6%
Average Number Of Times Per Month	2.2	

Source: Strategy Research Corporation

Most Hispanics (22.5%) patronize fast food pizza restaurants once a month; however, 17.1% also patronize these type of fast food restaurants twice a month, 8.7% do so approximately three times a month, and 19.7% patronize fast food pizza restaurants once a week or more often.

4. Mexican Fast Food Restaurants

Hispanics in the Phoenix/Tucson area eat at or take food from Mexican fast food restaurants approximately 1.3 times in an average month.

Overall, Mexican fast food restaurants such as El Taco and Taco Bell are patronized by 61.7% of Hispanics.

FREQUENCY OF PATRONAGE
FAST FOOD MEXICAN RESTAURANTS

	Percent	
Ever Visit	61.7%	
Five Or More Times A Week		1.0%
3-4 Times A Week		1.0
Twice A Week		1.5
Once A Week		5.8
Three Times A Month		7.2
Twice A Month		8.6
Once A Month		15.4
Less Than Once A Month		21.2
Never Visit	38.3	
TOTAL	100.0%	61.7%
Average Number Of Times Per Month	1.3	

Source: Strategy Research Corporation

A total of 9.3% of Hispanics eat Mexican fast food once a week or more often, while 15.8% eat Mexican fast food two to three times per month.

VIII. PRODUCT USAGE

This section of the Report presents product usage characteristics for two common beverages (carbonated soft drinks and beer).

A. CARBONATED SOFT DRINKS

1. Incidence Of Consumption

Carbonated soft drinks are indeed a very popular beverage among Hispanics in the Phoenix/Tucson area.

INCIDENCE OF CONSUMPTION
CARBONATED SOFT DRINKS

	Percent
Yes	97.5%
No	2.5
TOTAL	100.0%

Source: Strategy Research Corporation

Carbonated soft drinks are consumed by at least one family member in more than nine out of ten Hispanic households. Specifically, 97.5% of Hispanics interviewed indicated consumption of this beverage in their home.

2. Last Brand Purchased

Survey participants who indicated in-home consumption of carbonated soft drinks were asked, "Which brand of carbonated soda was last purchased for consumption in this household?"

Overall, cola flavored soft drinks are overwhelmingly preferred over any other flavor. Lemon-lime flavored sodas are the next most preferred, although following cola flavors at a substantial distance.

Pepsi-Cola, with mentions by 52.0% of the responding Hispanics is, by far, the carbonated soft drink brand purchased most often for consumption in the home. Coca-Cola Classic is the second most purchased brand as it was mentioned by 28.2%.

LAST BRAND PURCHASED FOR HOUSEHOLD CONSUMPTION CARBONATED SOFT DRINKS

	Percent
Pepsi-Cola	52.0%
Coca-Cola Classic	28.2
7-Up	5.6
Sprite	4.3
Shasta	1.9
Orange Crush	1.7
Diet Coke	1.5
Diet Pepsi	1.4
New Coke	1.0
Dr Pepper	1.0
Other	1.4
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 5.6% of the Hispanics stated that the 7-Up brand was the last brand purchased, while 4.3% made mention of the Sprite brand. Thus, these two lemon-lime flavored soft drinks ranked third and fourth, respectively.

Common to Hispanics in other markets, few Hispanic soft drink consumers in the Phoenix/Tucson area mentioned purchasing diet soft drink brands.

B. BEER

1. Incidence Of Consumption

Two-thirds of all Hispanics interviewed in the Phoenix/Tucson area (66.4%) indicated that beer is consumed at home by someone in their household.

INCIDENCE OF CONSUMPTION
BEER

	Percent
Yes	66.4%
No	33.6
TOTAL	100.0%

Source: Strategy Research Corporation

Thus, the ratio of in-home consumption to non-consumption registers at 2:1.

2. Last Brand Purchased

Consumers were asked, "Which brand of beer was last purchased for consumption in this household?"

Budweiser leads the market in terms of in-home brand share. A total of 59.6% of responding Hispanics stated that the last brand purchased for home use was Budweiser.

Coors, the second most mentioned beer brand, was purchased by 12.6%.

LAST BRAND PURCHASED FOR HOUSEHOLD CONSUMPTION
BEER

	Percent
Budweiser	59.6%
Coors	12.6
Bud Light	7.7
Coors Light	4.6
Miller Lite	4.4
Old Milwaukee	3.3
Old Style	2.1
Miller	1.8
Tecate	1.3
Other	2.6
TOTAL	100.0%

Source: Strategy Research Corporation

Low-calorie beers, although receiving substantially fewer mentions, were the next most mentioned types bought. Specifically, 7.7% of the Hispanics stated that Bud Light was last purchased, while 4.6% mentioned Coors Light and 4.4% mentioned Miller Lite.

IX. OWNERSHIP PATTERNS

This section of the Report presents data with regard to Hispanic ownership of various types of consumer goods and services. Specifically, the survey sample was queried regarding home ownership, ownership of automobiles and other types of vehicles, television ownership, telephone ownership, and the ownership of various types of credit cards. In addition, survey respondents were queried regarding certain financial relationships. The presence of a home pet was also established.

A. HOME OWNERSHIP

Buying a home is a very important financial decision among most families. Home ownership, however, has a significance beyond the simple acquisition of property: the decision to buy a home signifies putting down roots, establishing the family in a chosen area, and becoming part of a community.

Respondents were asked about their present and future arrangements for home ownership.

1. Incidence Of Home Ownership

Almost one-half of Hispanics (48.4%) presently own their own home.

HOME OWNERSHIP

	Percent
Own	48.4%
Rent	51.6
TOTAL	100.0%

Source: Strategy Research Corporation

2. Intent To Buy A Home Within The Next Year

Of those who currently rent, 41.2% plan to buy within the next twelve months, compared to 8.0% of those who currently own their home, and intend to buy a different home.

INTENT TO PURCHASE A HOME WITHIN THE NEXT YEAR

	Currently Rent	Currently Own
Yes	41.2%	8.0%
No	58.8	92.0
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Thus, intent to purchase is relatively strong, especially among those who currently rent.

3. Intent To Purchase By Type Of Home

Intending home buyers were queried as to the type of home they planned to buy.

The overwhelming preference among Hispanics in Phoenix/Tucson is for a single family home; 98.6% of Hispanics planning to buy a home within the upcoming year will seek out this type of residence.

PLAN TO BUY A HOME
BY TYPE

	Percent
House	98.6%
Condominium	0.6
Other	0.8
TOTAL	100.0%

Source: Strategy Research Corporation

Less than 2% of Hispanics indicated future purchase intent for a home other than a single family residence.

B. VEHICLE OWNERSHIP

How many Hispanic households own or lease a car, truck or other type of vehicle? Were the vehicles owned acquired new or used? How many Hispanics perform their own vehicle maintenance and repairs? And, how many Hispanics in the Phoenix/Tucson area plan on buying a new car, truck or other vehicle in the next year? What make is planned for purchase?

Do Hispanics in this southwestern area ever rent trailers, trucks or vans for do-it-yourself moving purposes?

The answers to these questions are found within this sub-section of the Report.

1. Vehicle Ownership

a. Incidence Of Ownership

All individuals surveyed were asked if anyone in their household owned/leased a car, truck or other type of motorized vehicle.

Overall, 88.4% of all Hispanic households have at least one vehicle.

VEHICLE OWNERSHIP

	Percent
Yes	88.4%
No	11.6
TOTAL	100.0%

Source: Strategy Research Corporation

b. Number Of Vehicles Owned

Hispanic households in the Phoenix/Tucson area have a strong likelihood of multiple vehicle ownership. The average Hispanic household in the Phoenix/Tucson area has 1.6 vehicles, namely an automobile, truck or other type of motorized vehicle.

NUMBER OF
VEHICLES OWNED/LEASED

	Percent
One	44.3%
Two	40.6
Three	12.7
Four Or More	2.4
TOTAL	100.0%
Average Per Household	1.6

Source: Strategy Research Corporation

Precisely 44.3% of all Hispanic vehicle-owning households own/lease one car/truck/other motorized vehicle, while an almost similar percentage (40.6%) own/lease two such vehicles.

Meanwhile, an additional 15.1% of all Hispanic vehicle-owning households have in excess of two vehicles.

2. New Versus Used Vehicle Purchase

All Hispanics who indicated the presence of at least one vehicle in their household were asked if any of the vehicles were acquired new.

NEW VS. USED
VEHICLE PURCHASE

	Percent
Yes	30.8%
No	69.2
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 30.8% of the responding Hispanics stated that they had made a new vehicle purchase. Thus, 69.2% of vehicles were purchased used.

3. Purchase Of Auto Accessories And Parts

Hispanic households with at least one motorized vehicle present were asked, "In the past year, have you or any other member of this household made any purchases of auto accessories or auto parts for do-it-yourself maintenance or repairs?"

PURCHASE OF
AUTO ACCESSORIES/PARTS
FOR DO-IT-YOURSELF MAINTENANCE/REPAIRS

	Percent
Yes	79.3%
No	20.7
TOTAL	100.0%

Source: Strategy Research Corporation

The Phoenix/Tucson Hispanic market is an extremely large "do-it-yourself" auto maintenance/repair market. That is, when their vehicles require maintenance/repair, Phoenix/Tucson Hispanics will most likely attend to their household's vehicle(s) themselves. A total of 79.3% of Hispanics stated that they themselves or some other household member had purchased auto parts/accessories in the past year for do-it-yourself maintenance/repairs. These auto parts and accessories can range from the simple replacement of wiper blades or a fan belt to the more intricate replacement of an alternator or carburetor.

4. Intent To Purchase A New Vehicle

All survey participants were asked if they planned to buy or lease a new car, truck or other vehicle within the next year.

New car/truck/other vehicle sales look promising as 13.8% of Hispanic households plan on purchasing or leasing a new vehicle within the next twelve months.

INTENT TO PURCHASE
A NEW VEHICLE WITHIN THE NEXT YEAR

	Percent
Yes	13.8%
No	86.2
TOTAL	100.0%

Source: Strategy Research Corporation

Hispanics indicating the purchase of a new vehicle in the near future were asked what make they were planning on buying.

Almost one-third of the responding Hispanics (32.6%) stated that they were most likely going to purchase a Ford. The second most mentioned make was a Chevrolet, at 15.4%.

PLAN TO BUY A NEW VEHICLE BY TYPE

	Percent
Ford	32.6%
Chevrolet	15.4
Toyota	9.3
Buick	6.9
Lincoln/Mercury	5.5
Pontiac	4.0
Oldsmobile	3.4
Chrysler	3.1
Acura	3.0
Cadillac	3.0
Mercedes Benz	2.4
Nissan	2.4
Mazda	2.0
Other	2.4
Don't Know/Undecided	4.6
TOTAL	100.0%

Source: Strategy Research Corporation

Overall, domestic makes hold a much greater edge over import models when it comes to Hispanic purchasing.

5. Trailer/Truck/Van Rental

The survey sample was also asked, "Do you or any other member of this household ever rent trailers, trucks or vans for do-it-yourself moving purposes?"

RENTAL OF
TRAILERS, TRUCKS, VANS
FOR DO-IT-YOURSELF MOVING

	Percent
Yes	16.2%
No	83.8
TOTAL	100.0%

Source: Strategy Research Corporation

Slightly under one-fifth of all Hispanics (16.2%) rent trailers/trucks/vans for their own use from places such as U-Haul or Ryder Truck Rentals.

C. CREDIT CARD OWNERSHIP

Credit cards have largely become a part of American society. To most Hispanics, especially newcomers, they are still a relatively new form of managing their finances. How many of Phoenix/Tucson Hispanics have a credit card?

1. Incidence Of Ownership

A total of 22.7% of Phoenix/Tucson Hispanic households have at least one member who has at least one type of entertainment/bank card or retail service credit card.

CREDIT CARD OWNERSHIP

	Percent
Yes	22.7%
No	77.3
TOTAL	100.0%

Source: Strategy Research Corporation

2. Types Of Credit Cards Owned

All credit card-owning households were asked if any of the following types of credit cards were owned by household members:

- Gasoline Company
- Department Store
- MasterCard/Visa
- American Express/Carte Blanche/Diners Club
- Choice/Discover

By far, the most widely owned types of credit cards among cardholders are those issued by both banks as well as department stores. Both these types of credit cards are owned by virtually the same percentage of Hispanics. Specifically, 67.2% of Hispanics have a MasterCard or Visa Card, while 66.2% have at least one major department store credit card (i.e.: Sears, JC Penney, Dillard's).

TYPES OF CREDIT CARDS OWNED
(AMONG THOSE WHO OWN)

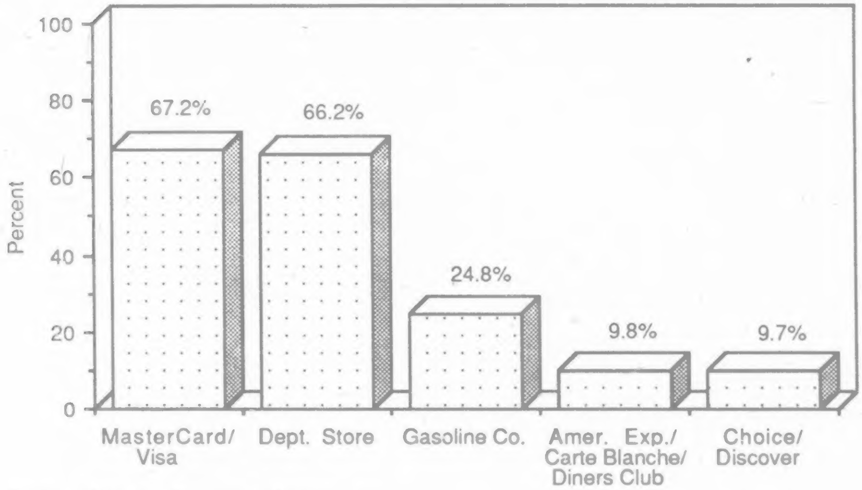
	Percent
MasterCard/Visa	67.2%
Department Store	66.2
Gasoline Company	24.8
American Express/Carte Blanche/Diners Club	9.8
Choice/Discover	9.7

Source: Strategy Research Corporation

One-fourth of all Hispanic households (24.8%) also have one or more gasoline company credit cards.

Approximately 10% of all Hispanics have one of these types of entertainment cards: American Express/Carte Blanche/Diners Club and Choice/Discover.

TYPES OF CREDIT CARDS OWNED AMONG THOSE WHO OWN



Source: Strategy Research Corporation

D. TELEVISION OWNERSHIP

All Hispanics participating in the survey were asked to state the number of televisions sets that could be found in their household. If at least one television set was present, Hispanics were queried as to their household's subscription to cable television as well as if they owned a VCR (video cassette recorder).

1. Incidence Of Ownership

Virtually every Hispanic household in the Phoenix/Tucson area (99.0%) has at least one television set.

In fact, an average of 1.7 television sets per household has been measured.

NUMBER OF TELEVISION SETS PRESENT IN HOUSEHOLD

Have A TV Set	99.0%	
One		44.0%
Two		42.9
Three		10.0
Four		0.9
Five Or More		1.2
Do Not Have A TV Set	1.0	
TOTAL	100.0%	99.0%
Average Number Per Household	1.7	

Source: Strategy Research Corporation

Forty-four percent of all Hispanic households have one television set present, while 42.9% have two television sets. Three or more sets can be found in 12.1% of the households.

2. Cable Television Subscription

As the incidence of television ownership is so high, virtually all Hispanics were also asked whether or not their household presently subscribed to cable television.

CABLE TELEVISION SUBSCRIPTION

	Percent
Yes	24.0%
No	76.0
TOTAL	100.0%

Source: Strategy Research Corporation

Almost one-fourth of Hispanic households (24.0%) currently have cable hookup.

3. VCR Ownership

The ownership of a video cassette recorder (VCR) is high among Phoenix/Tucson Hispanics who have television sets.

VCR OWNERSHIP

	Percent
Yes	48.9%
No	51.1
TOTAL	100.0%

Source: Strategy Research Corporation

Almost half (48.9%) of Hispanics households have this "trendy" video electronic equipment.

E. TELEPHONE SERVICE

Survey respondents were asked if they presently had a telephone in their home. Hispanics affirming ownership were subsequently asked if their phone number was listed under their family's name in the phone book or whether it was an unlisted number.

Currently, 63.2% of Phoenix/Tucson Hispanics have phone service in their home.

TELEPHONE OWNERSHIP

	Percent
Do Not Own Telephone	**36.8%**
Own Telephone	**63.2**
Listed	26.7
Unlisted	36.5

Source: Strategy Research Corporation

More than one-third (36.5%) of Hispanic households with telephones have unlisted numbers.

F. FINANCIAL RELATIONSHIPS

Hispanics were queried regarding current interaction with a bank and/or savings and loan association. Individuals were also asked about the presence of a checking and/or savings account. The primary banking institution was also established.

1. Incidence Of A Banking Relationship

Survey participants were asked whether they themselves and/or any other household member currently maintained a relationship with a financial institution.

INCIDENCE OF A BANKING RELATIONSHIP AMONG HOUSEHOLD MEMBERS

	Percent
Yes	46.1%
No	53.9
TOTAL	100.0%

Source: Strategy Research Corporation

Almost one-half of the Hispanics interviewed (46.1%) affirmed at least one financial institution relationship or type of account.

2. Select Bank Accounts

In addition to being asked whether anyone in their household had a bank account, all Hispanics interviewed were asked if anyone in their household currently had either a checking and/or savings account.

SELECT BANK ACCOUNTS

	Percent
Savings Account	44.2%
Checking Account	41.4

Source: Strategy Research Corporation

Slightly more Hispanics have a savings account (44.2%) than a checking account (41.4%).

3. Primary Financial Institution

Hispanics indicating a current financial institution relationship were asked to name the bank or savings and loan association with which the majority of banking transactions are conducted -- that is, their primary bank.

The two most named financial institutions (Valley National Bank and First Interstate Bank) are the area's two largest banks in terms of assets. As concerns Hispanic relationships with these two banks, a total of 32.5% of all responding Hispanics named Valley National Bank as their household's primary financial institution, while 23.8% named First Interstate Bank.

Both Valley National Bank and First Interstate Bank received slightly higher mentions by Hispanics in Tucson compared to those in Phoenix. Specifically, 38.3% of the Hispanics in Tucson named Valley National Bank as their household's primary bank, while 27.9% named First Interstate Bank. In Phoenix, Valley National Bank is the primary bank of 27.5%, while First Interstate Bank is the primary bank for 19.8% of Hispanics.

NAME OF FINANCIAL INSTITUTION
WHERE BANKING IS PRIMARILY DONE

	Total	Phoenix	Tucson
Valley National Bank	32.5%	27.5%	38.3%
First Interstate Bank	23.8	19.8	27.9
Western Savings	15.8	24.2	1.1
The Arizona Bank	12.5	13.4	9.8
Others	15.4	15.1	22.9
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

Western Savings is also the primary choice of 24.2% of Hispanics in Phoenix; 1.1% of Hispanics in Tucson have made Western Savings their primary financial institution.

The Arizona Bank, with total mentions by 12.5%, ranks fourth among Phoenix/Tucson Hispanics. The Arizona Bank received slightly more mentions by Hispanics in Phoenix than those in Tucson (13.4% versus 9.8%, respectively).

G. HOUSEHOLD PETS

The incidence of a household pet such as a dog, cat or bird was also measured.

Currently, more than half of all Hispanic households (54.2%) in the Phoenix/Tucson area have at least one pet, which is indicative of a viable market for pet foods and supplies.

INCIDENCE OF PET OWNERSHIP

	Percent
Yes	54.2%
No	45.8
TOTAL	100.0%

Source: Strategy Research Corporation

In the next section, some ways in which Hispanics spend their leisure time are presented.

X. LEISURE TIME ACTIVITIES

How do Hispanics in Phoenix/Tucson spend their leisure time? Where do they go, what do they do? The activities of these Hispanics reveal a good deal about their interests and also about their social and family organization.

A. PARTICIPATION IN ACTIVITIES

In order to gain a better understanding of social patterns and characteristics among Hispanics in Phoenix/Tucson, all survey respondents were asked a series of questions concerning participation in sports, social and recreational activities.

Respondents were asked if they themselves, or anyone else in their household, had participated in any of a series of activities and events in the past year. This list included both family/friend events (birthday parties, family reunions/cookouts/picnics, weddings, baptisms, "quinces") and attractions (parades/festivals, the circus, live concerts, sporting events).

Phoenix/Tucson Hispanic households are active in many recreational pursuits. They are especially inclined to attend such family/friend oriented events such as birthday parties, family reunions/picnics, weddings, baptisms, and "quinces".

More than three-fourths of Hispanics (78.8%) had been to at least one birthday party and a family reunion/cookout/picnic (76.6%). A total of 69.7% had attended a wedding, while 63.6% had attended a baptism. Further, 44.5% have also been to a Sweet Fifteen/"Quince" party. The latter is similar to an American Sweet Sixteen party, however, somewhat more elaborate. The celebrant wears a white dress and is accompanied by 14 attendants and their escorts -- all of whom are dressed in tuxedos and gowns. A "quince" begins with a high mass, which is followed by a large party attended by numerous guests. The "quince" is a cultural affair which is celebrated much more by Hispanics residing in the United States than those in other countries.

ATTRACTIONS/EVENTS ATTENDED IN THE PAST YEAR

	Percent
Been To A Birthday Party	78.8%
Had Family Reunion/Cookouts/Picnic	76.6
Attended A Wedding	69.7
Attended A Baptism	63.6
Watched Local Parades/Festivals	46.1
Been To A Sweet Fifteen/"Quince" Party	44.5
Been To The Circus	40.9
Attended A Professional Sporting Event Such As A Basketball Or Football Game	36.0
Attended Live Concerts	34.5

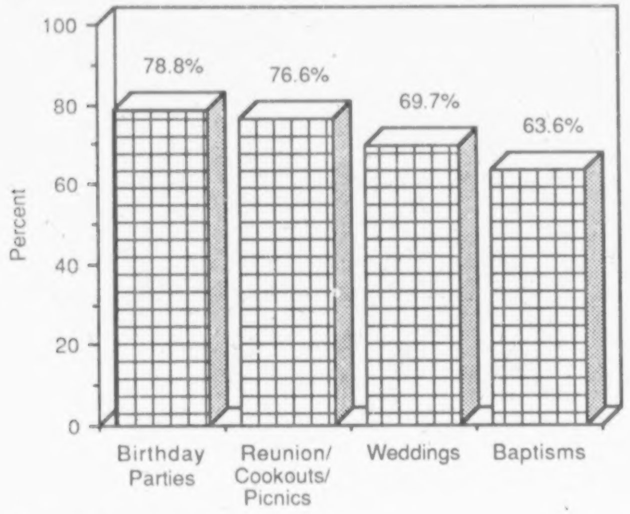
Source: Strategy Research Corporation

Throughout the year, scheduled events such as community parades and festivals take place. As for these, 46.1% of Hispanics have attended local parades and festivals in the past year such as *Fiesta De Los Vaqueros* which is held in February, and *The Tucson Fiesta* , which is a six week-long event starting in April. At year's end, festivities also include the *posadas,* Mexican neighborhood celebrations that take place during the nine days preceding Christmas.

A total of 40.9% of all Hispanic households also had at least one family member who had been to the circus; 34.5% attended live concerts.

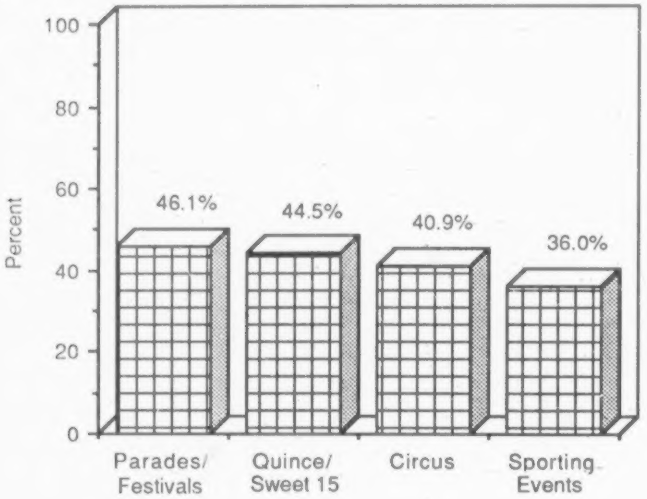
More than one-third of Hispanics (36.0%) stated that they and/or other household members had attended at least one professional sporting event in the past year. Contributing to this are Arizona State University -- located in the Phoenix metro area -- and the University of Arizona -- located in Tucson. These universities also provide area football, basketball, baseball, and volleyball games.

ATTRACTIONS/EVENTS ATTENDED IN THE PAST YEAR



Source: Strategy Research Corporation

ATTRACTIONS/EVENTS ATTENDED IN THE PAST YEAR



Source: Strategy Research Corporation

B. MOVIE ATTENDANCE

All Hispanics were asked, "How often do you or any member of your family go to the movies?"

In general, Hispanics in Phoenix/Tucson frequent the movie theater approximately once a month. This rate of attendance is high. For example, the average Hispanic in New York will frequent the movies less than once a month -- the average frequency among New York Hispanics is 7.2 times per year.

Overall, approximately two-thirds of Hispanics (63.7%) in the Phoenix/Tucson area go to the movies.

FREQUENCY OF MOVIE ATTENDANCE

	Percent	
Go To The Movies	63.7%	
Once A Week		5.1%
2-3 Times A Month		7.2
Once A Month		14.4
Once Every 2 Months		6.2
Once Every 3-5 Months		7.1
Once Every 6 Months		8.8
Less Than Once Every 6 Months		14.9
Do Not Go To The Movies	36.3	
TOTAL	100.0%	63.7%
Average Times Per Month	1.0	

Source: Strategy Research Corporation

A total of 5.1% of Hispanics go to the movies once a week, while 7.2% go to the movies two to three times a month. Fourteen percent of Hispanics (14.4%) frequent the motion-picture theater once a month.

C. VACATION DESTINATIONS

Vacations are a time of year which most everyone -- man, woman or child -- looks forward to. Some people like to spend their vacations in another city or place (foreign or domestic), while others just look forward to spending some relaxation time at home with their family and friends. Where do Hispanics in the Phoenix/Tucson area spend their vacation?

All survey participants were queried as to where they spent their last vacation.

As southern Arizona offers such an abundance of recreational activities and points of interest along with cultural activities, it is not surprising that the majority of Hispanics in the Phoenix/Tucson area (56.0%) chose to remain in the area. Further, 3.7% of Hispanics visited other places in the state of Arizona.

STATE/COUNTRY WHERE LAST VACATION* WAS SPENT

	Percent
Stayed In Phoenix/Tucson	56.0%
Mexico	17.0
California	11.5
Other Areas Of Arizona	3.7
New Mexico	3.0
Utah	2.6
Las Vegas	2.4
Texas	2.1
Other	1.7
TOTAL	100.0%

Source: Strategy Research Corporation

* Vacation only. Does not include travel for business-related reasons, educational purposes, weddings, graduations and other family/friend type visits, or to take care of financial matters.

Neighboring south is Mexico, where 17.0% of Hispanics chose to spend their last vacation -- either visiting with friends/family of exploring new places on their own.

In addition, numerous Hispanics in Phoenix/Tucson spent their last vacation within Arizona's contiguous states. Namely, 11.5% of Hispanics spent time in California which lies due west of Arizona, while 3.0% visited New Mexico (directly east) and 2.6% also visited Utah (directly north).

D. PURCHASE OF LOTTERY TICKETS

Lotteries have traditionally been an attraction offered by certain states (29 in total) such as New York, New Jersey, Michigan, et al. And, in fact, usage throughout the United States has recently been increasing as additional states such as Florida have adopted official lotteries.

Do Hispanics in the Phoenix/Tucson area play the lottery?

All Hispanics were asked, "Do you or any other member of this household ever buy lottery tickets?"

PURCHASE OF LOTTERY TICKETS

	Percent
Yes	76.1%
No	23.9
TOTAL	100.0%

Source: Strategy Research Corporation

More than three-fourths of Hispanics (76.1%) stated that someone in their household has bought one or more lottery tickets.

The next section of this Report looks at the airline travel patterns of Hispanics.

XI. AIRLINE TRAVEL PATTERNS

Do Hispanics residing in the Phoenix/Tucson area travel by air? What are their reasons for travel? Where do they fly most frequently -- to other places in the U.S. or abroad? Are there any airline carriers which are used more often than others?

In this Study, survey participants were asked if they had taken an airline trip within the past year, the reasons for doing so, the destination of their last trip, and which airline they last flew.

A. PAST YEAR TRAVEL

A total of 20.2% of Phoenix/Tucson Hispanics traveled by air within the past year.

AIRLINE TRAVEL
WITHIN THE PAST YEAR

	Percent
Yes	20.2%
No	79.8
TOTAL	100.0%

Source: Strategy Research Corporation

B. PURPOSE OF AIRLINE TRAVEL

Recent air travelers were asked to state the purpose of their last trip.

The most frequently mentioned reason for traveling by air was for pleasure/personal/non-business. More than eight out of ten Hispanics mentioned pleasure/personal reasons as the purpose of their last trip. This pleasure/personal/non-business category includes travel for vacations, educational purposes, to take care of financial matters, for formal celebrations such as weddings, and other such family/friend type visits.

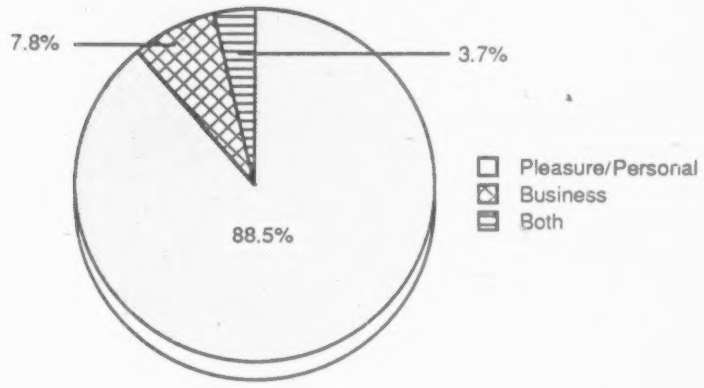
PURPOSE OF LAST AIRLINE TRIP WITHIN THE PAST YEAR

Purpose	Percent
Pleasure/Personal/ Non-Business	88.5%
Business	7.8
Both	3.7
TOTAL	100.0%

Source: Strategy Research Corporation

Hispanics who last traveled for business-related reasons accounted for less than 10% of the sub-sample (7.8%).

PURPOSE OF AIRLINE TRIP



Source: Strategy Research Corporation

C. FLIGHT DESTINATIONS

What are the most common destinations for Phoenix/Tucson air travelers? Air travelers were asked the destination of their most recent airline trip taken within the past year.

California was the most popular travel destination among Hispanics, although Mexico followed closely. Specifically, 29.1% of Hispanics stated that they had last flown to places within the state of California. Mexico, with mentions by 26.7%, ranked second which exemplifies the strong ties that Hispanics in Phoenix/Tucson have with their family and friends.

DESTINATION
OF LAST AIRLINE TRIP
WITHIN THE PAST YEAR

	Percent
California	29.1%
Mexico	26.7
Texas	11.6
Utah	10.6
Nevada	6.7
New Mexico	6.3
Arizona	1.8
Florida	1.6
Central/South America	1.6
Caribbean	0.7
Other	3.3
TOTAL	100.0%

Source: Strategy Research Corporation

Texas cities were the last flight destinations for 11.6% of the Hispanics, while 10.6% flew to places in Utah.

Arizona's neighboring states of Nevada and New Mexico received mentions of 6.7% and 6.3%, respectively.

D. AIRLINE CARRIERS USED

Air travelers were also asked which airline they used on their last trip.

Southwest Airlines was last flown by one-fourth (24.8%) of the Hispanic air travelers. This air carrier thus ranked first, followed by TWA which was last flown by 15.6% of the Hispanics.

AIRLINE USED ON LAST TRIP

	Percent
Southwest	24.8%
TWA	15.6
American	11.9
Western	11.0
AeroMexico	10.1
America West	10.1
PSA	5.5
Eastern	3.7
Delta	2.8
Continental	1.8
Other	2.7
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 11.9% of the Hispanics claimed that they had last flown on American Airlines, while Western Airlines was mentioned by 11.0%.

AeroMexico and America West Airlines both received similar levels of mention (10.1% each).

XII. EXECUTIVE SUMMARY

- Overall, Arizona ranks seventh among all states with regard to Hispanic population.
- Arizona, however, ranks fourth among all states in terms of Hispanic concentration (proportion of Hispanics to the total population).
- The Phoenix ADI, comprised of eleven counties, ranks 14th in terms of U.S. Hispanic population.
- The Tucson ADI, which consists of four counties, ranks 19th in Hispanic population.
- The 1988 Hispanic population of the 15-county Phoenix/Tucson market area is estimated at 583,300 or 17.6% of the total area population.
- The 1988 Hispanic population of the Phoenix ADI is 366,900 persons. The 1988 Hispanic population of the Tucson ADI is 216,400 persons.
- In terms of absolute numbers, the vast majority of Hispanics (284,500) within the Phoenix ADI reside in Maricopa County, while within the Tucson ADI, the majority of Hispanics (162,000) are located in Pima County. Together, Maricopa and Pima counties comprise 76% of the market's total Hispanic population.
- When the Hispanic population of the Phoenix and Tucson ADIs are combined, they account for approximately 94% of Arizona's total Hispanic population.
- There are an estimated 159,000 households in the Phoenix/Tucson area headed by Hispanics; 76,900 of these households are in Maricopa County and 43,800 are in Pima County. Hispanic households represent approximately 13% of all area households.
- Average household size is large among Phoenix/Tucson Hispanics (3.7 persons).
- Virtually all Hispanics in the Phoenix/Tucson market are of Mexican origin/descent (95%).
- 44% of Hispanics were born in the U.S., while 56% were born in another country.
- The average length of residency of Hispanic heads of household in the United States is 21 years, 6 months; the average length of residency for the Phoenix/Tucson area is 17 years, 10 months.
- The average age for Phoenix/Tucson Hispanics is 24.5 years. Approximately 43% of the Phoenix/Tucson market is under 18 years of age, while 30% are between the ages of 18 and 34.
- One-fourth of Phoenix/Tucson Hispanics hold white collar jobs; 50% work in blue collar jobs.
- Currently there are 1.3 persons with full-time employment in Hispanic households.
- More than one-third of Hispanic households have at least one female present who works full-time.
- 35% of Hispanic heads of household have completed high school; 9% have college level training.

- Total annual household income for Phoenix/Tucson Hispanics averages $21,246.
- This represents an adjusted annual buying power for Hispanics of $2.97 billion in the Phoenix/Tucson area.
- 88% of Hispanics first learned to speak Spanish.
- ABILITY TO SPEAK/READ/WRITE "VERY WELL/WELL" RESPONSES

Speak		Read		Write	
Spanish	English	Spanish	English	Spanish	English
86.9%	54.8%	75.5%	51.9%	74.7%	50.2%

- Spanish is the primary language of Hispanics at home and on social occasions (61% and 50%, respectively).
- Hispanics attach great importance to preserving their language: more than 94% feel that it is extremely important for their children to read and write Spanish perfectly.
- In addition to language, Hispanics emphasize the importance of traditional cultural values and show pride in their heritage. Aspects such as family ties and enjoyment of Latin music are instances of continuing identification with their culture.
- Almost three-fourths of Hispanics patronize chain supermarkets most often.
- Weekly food store expenditures average $86.59.
- 60% of Hispanics patronized at least one convenience store in the past week. A total of 2.6 visits per week are made on average.
- In the past month, 82% of Phoenix/Tucson Hispanics made purchases in a pharmacy/drug store.
- In the past month, 71% of Phoenix/Tucson Hispanics also patronized a discount store, and 53% also shopped in a department store.
- 45% of Hispanics had been to an enclosed shopping mall within the past month.
- Fast Food Consumption/Frequency:

	Yes, Eat	Times Per Month
Hamburger	86.6%	3.8
Chicken	82.0	2.4
Pizza	82.6	2.2
Mexican	61.7	1.3

- Virtually all Hispanics in the Phoenix/Tucson area drink carbonated soft drinks (97.5%) and two-thirds also drink beer (66.4%).

- 99% of Phoenix/Tucson Hispanics have at least one television set in their household; the average per household is 1.7.
- Approximately half of all area Hispanic households have a VCR.
- 63% of Phoenix/Tucson Hispanic households have a telephone.
- 88% of Hispanic households have a car, truck or other vehicle. The average number of vehicles per household is 1.6.
- Vehicle "do-it-yourself" maintenance/repair is a big market: 79% of Hispanics purchase auto accessories/auto parts for "do-it-yourself" maintenance/repairs.
- As regards home ownership, 48% of Hispanics own their homes.
- 41% of those who cuurently rent and 8% of those who already own plan to buy a home within the next year. Virtually all favor single-family homes over any other type.
- 23% of Hispanics have credit cards, the most popular being MasterCard/Visa and the department store type.
- 44% of Hispanic households currently maintain a savings account, and 41% maintain a checking account.
- 54% of all Hispanic households have at least one pet.
- Phoenix/Tucson Hispanics are very inclined to attend such family-oriented events as birthday parties, weddings, baptisms, and family reunions/cookouts/picnics.
- Hispanics in Phoenix/Tucson go to movie theaters quite frequently -- approximately once a month.
- 76% of Hispanics play the lottery.
- 20% of Hispanics traveled by air within the past year.
- Virtually all Hispanics stated that their primary purpose for travel was for pleasure/personal reasons. Approximately 10% of Hispanics traveled for business reasons.
- The main flight destinations for Hispanic air travelers are California (29%) and Mexico (27%).

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B8545-2.4-F

THE 1989 SOUTH FLORIDA LATIN MARKET

Strategy Research Corporation ®

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FOREWORD

This Study, *THE 1989 SOUTH FLORIDA LATIN MARKET*, is the twelfth major South Florida Latin Market Study conducted by STRATEGY RESEARCH CORPORATION.

The past studies conducted by Strategy Research Corporation, going back to 1967, have brought current population data, market profile information, shopping pattern data, and product usage information to the marketing practitioners of the U.S. These data have been used by public and private demographers, planners and marketers to develop reliable and effective programs.

INTRODUCTION

STATE OF FLORIDA
Office of the Governor
THE CAPITOL
TALLAHASSEE, FLORIDA 32399-0001

BOB MARTINEZ
GOVERNOR

Dear Readers:

Once again, it is a pleasure to contribute this introduction to the 1989 issue of the "South Florida Latin Market Study".

I am very proud when I consider the Hispanic community in South Florida today and look back at its progress since the 1960's.

Almost thirty years since its formation, the Hispanic community's potential as a marketplace is no longer something that commercial, manufacturing and advertising executives need to be reminded about. The question is no longer asked if business opportunities exist in South Florida's Hispanic communities, rather, the question now is how to keep up with them.

Many people tend to forget that this is still a young community, characterized by renewal, vitality and diversity. There is a large, rapidly growing young Hispanic-American segment, which is bilingual, dual-cultural, and well-educated. They not only speak the language of the State and Nation, but are the best spokespersons for South Florida's Hispanic community. They bring their ideas to business and give their culture to this place, making it a fascinating land to live, work, visit and admire.

South Florida can be considered now the center of a network of trade, culture, ideas and influence, to the Caribbean, Central, Latin America and finally, throughout the world.

The 1989 South Florida Latin Market Study will provide much data about this dynamic community than any other information. It illustrates for us the past contributions of our Hispanic communities, and its potential for the future.

Sincerely,

Governor

BG/hbc

PREFACE

Office of the Mayor
METROPOLITAN DADE COUNTY-FLORIDA
METRO-DADE CENTER
111 N. W. FIRST STREET — SUITE 230
MIAMI, FLORIDA 33128

Stephen P. Clark
Mayor

Telephone
(305) 375-5305

September 30, 1988

Dear Readers:

Through the years, I have had the pleasure of experiencing the importance of the Hispanic Community to South Florida. South Florida has been enriched socially, economically, politically and in an unending number of ways by the Hispanic Community.

We are becoming an international capital for business, tourism, cultural arts and the Hispanic Community is a driving force.

The Hispanic Community is changing. The 1989 South Florida Latin Market Study will provide us with information regarding this marketplace; people's thoughts, attitudes, preferences, etc. I would like to thank Strategy Research Corporation and the Sponsors of this event, for making this study possible.

Sincerely,

Stephen P. Clark

SPC/fcd

City of Miami. Florida

XAVIER L. SUAREZ
MAYOR

P O BOX 330708
MIAMI FLORIDA 33233-0708
305-579-6010

October 7, 1988

Dear Readers:

The City of Miami has been enriched socially, economically, and politically by the Hispanic Community.

We are becoming an international capital for business, tourism, and cultural arts.

Many people tend to forget that this is still a young community, characterized by renewal, vitality and diversity. There is a large, rapidly growing young Hispanic-American segment, which is bilingual, dual-cultural, and well-educated. They not only speak the language of the State and Nation, but are the best spokespersons for South Florida's Hispanic community. They bring their ideas to business and give their culture to this place, making it a fascinating City to live, work, visit and admire.

The 1989 South Florida Latin Market Study will provide much information about this dynamic community. It illustrates for us the past contributions of our Hispanic communities, and its potential for the future. I would like to thank Strategy Research Corporation and the Sponsors of this event, for making this study possible.

Very truly yours,

Xavier L. Suarez

XLS/lew

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I. PURPOSE, SCOPE AND METHODOLOGY

A. PURPOSE OF THE STUDY

The Miami ADI (Area of Dominant Influence) is the third largest Hispanic market in the United States, with an estimated population of 963,560 Hispanic persons as of January 1989. The Miami ADI is comprised of three counties: Dade, Broward and Monroe. Numerically, the vast majority of Latins (879,500) within the Miami ADI reside in Dade County.

With a strong and vibrant Latin heritage, the South Florida area has become the new hometown for many Latins in the eighties. The Latin community has become one of the fastest growing segments in the South Florida area. In Broward County alone, the Latin population has grown 89% since 1980; in Dade County, a 32% growth in Latin population has taken place since 1980.

South Florida's Latin community has nurtured many leaders in areas such as the arts, business, education and government. Although Latins of Cuban origin or descent have traditionally dominated the market, many Hispanics from Central and South America also consider South Florida as their home.

The South Florida area has witnessed an unprecedented growth in the past quarter century. What was once a tourist town, Miami has been transformed into a center for banking and international trade. With Cubans as its Hispanic base, South Florida has acquired a unique cultural identity. To a large degree, the recent redevelopment of South Florida has resulted from the masses of Cubans escaping the regime imposed by Fidel Castro in 1959. The Cuban phenomenon has produced substantial economic, political and social changes to South Florida.

The dynamics of the South Florida community require constant study to measure the size and components of its population. The demographic and socio-economic profile of the residents must also be measured.

The objective of this Study is to provide up-to-date data on this large and growing market that offers marketers scope, opportunity and challenge. This objective has been reached by considering and evaluating several key aspects of this market:

- Demographic Characteristics: What is the size of the Latin market? What are the components and countries of origin of South Florida's Latins? Are they long-time residents or have they recently arrived from other countries?
- Social Characteristics: How do Latins and non-Latins compare across a range of social/lifestyle behavior, including family, work, education and language usage?
- Purchase And Spending Patterns: How do Latins and non-Latins compare with respect to their priorities and habits in financial expenditure?

To attain these objectives, Strategy Research Corporation conducted a Study using as a basis the Survey Research Method. Employed was a carefully studied and comprehensive sample design, a detailed questionnaire which incorporated the areas and topics of concern, as well as the implementation of effective fieldwork controls throughout the data gathering phase of the Study.

The results of this planning have yielded, in this *1989 South Florida Latin Market Study*, a thoroughly detailed and up-to-date basis for reaching this unique and dynamic sector.

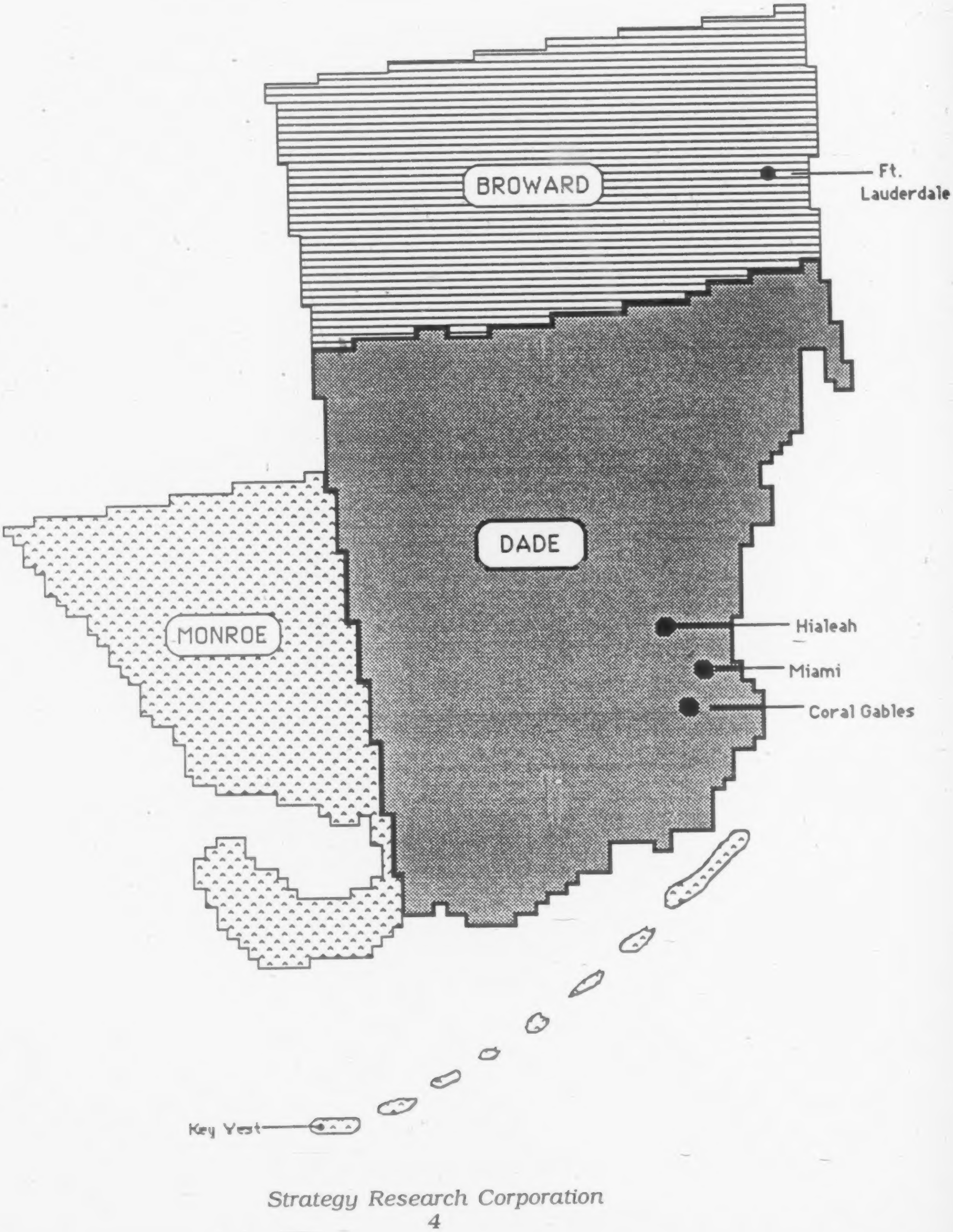
B. SCOPE OF THE STUDY

This Study is confined to the South Florida market, primarily Dade and Broward Counties, and includes residents of the market, both Latin and non-Latin.

In addition to the new data gathered from this Study, some of the data in this Study provides trend line information from studies previously conducted by Strategy Research Corporation.

The map on the following page illustrates the South Florida market, as it is referred to in this Study.

MIAMI ADI


BROWARD
Ft. Lauderdale
DADE
Hialeah
Miami
Coral Gables
MONROE
Key West

C. METHODOLOGY

Strategy Research Corporation conducted both primary and secondary research in the gathering of information provided in this Report.

Secondary data sources are cited such as the publications of the U.S. Department of Commerce, Bureau of the Census. State and federal sources were also used, as well as material from government sources dealing with Hispanics in the United States.

Population totals for Census base years are drawn from U.S. Department of Commerce, Bureau of the Census published reports. Population forecasts utilized in the Study were made by Strategy Research Corporation.

With regard to the primary data presented in this Study, the methodology utilized was the Survey Research Method.

The Study was based on 1,200 personal, face-to-face interviews with heads of household. Of these, 600 interviews were conducted with heads of household in Latin households, and 600 interviews were conducted with heads of household in non-Latin households.

The sampling method utilized a stratified, segmented, random probability sample of households within the South Florida area, namely, Dade and Broward Counties.

The sample was drawn by Strategy Research Corporation's professional sampling staff. A Clustering technique was used, procedural in samples for in-home interviews. The sampling cluster points were actual census blocks designated by the Bureau of the Census. Every census block which has at least one Hispanic was included in the sample universe. SRC maintains currently updated census block, census tract, and household data for survey and economic research purposes. A random probability sample was pulled, using a random starting point and a sequential interval of persons.

Once a random skip pattern was established, sampling points were assigned to their appropriate census blocks. These statistics were transferred to census block maps and then to street maps. For each block, one of six random house selection patterns was chosen randomly, and individual block maps were labeled with street names, starting points, skip patterns, and rotation directions. Nine interviews were completed within each cluster, which consists of one sample block.

These interviews were conducted by trained, professional interviewers of Strategy Research Corporation, working under the direct supervision of Strategy Research Corporation staff field supervisors. Spanish and English language versions of the Study questionnaire were prepared. Interviews among Latins were conducted by Hispanic, bilingual interviewers.

A minimum of 20 percent of each interviewer's work was validated daily by staff supervisors of Strategy Research Corporation. All questionnaires were then carefully edited, coded and prepared for computer tabulation. All programming and data processing was done in-house at Strategy Research Corporation.

Interviewing for this Study was conducted in August, 1988.

Technical Note:

For purposes of this Study, the terms Latin and Hispanic will be used interchangeably. The definition of a Latin (Hispanic) is a person who designates himself or herself to be of Latin (Hispanic) origin or of Latin (Hispanic) ancestry. This is the same definition currently employed by the Bureau of the Census.

Non-Latins are defined as individuals who are not of Latin (Hispanic) origin/descent.

Strategy Research Corporation employs the best of industry practices and standards in its work and utilizes the best efforts to produce reliable studies. Nevertheless, no claim is made that the Study is free of all errors, and the Firm accepts no liability for the information or interpretation within this Report.

II. THE LATIN UNIVERSE

A. INTRODUCTION

The Miami ADI has the third largest Latin population among the nation's metropolitan areas, following Los Angeles and New York. As of January 1, 1989 South Florida -- which is inclusive of Dade, Broward and Monroe Counties -- is estimated to have a Latin population of 963,560. In Dade County, Latins currently comprise 42.3% of the total population base.

These Latins are primarily Cubans; however, the Latin community also consists of Hispanics who have come to live in South Florida from throughout Central America, South America, and the Caribbean. Recent arrivals from the war-torn areas of Central America have been joined by arrivals from currency-weak and inflation-ridden countries such as Mexico.

Overall, South Florida ranks among the most dynamic communities in the United States, as growth and changes in the population base and economic base have been sweeping and definitive.

The physical changes in South Florida are clearly visible to residents of the community, and many economic changes are evident to businessmen throughout the nation and world. Dade County, known by many simply as Miami, the largest city in Dade County, has become an international city on the shores of the United States.

Linked to Latin America by the cultural and business ties of its residents, South Florida developed into a major center for international trade and banking for interchanges between Central and South America, the Caribbean, and even Europe.

Why has South Florida flourished so much?

Reasonably enough, because of the desirability of the climate, but more so, because of the proximity of Miami to Latin America. Miami now enjoys excellent transportation and communication facilities, linking South Florida to Latin America and the rest of the United States. Miami has often been referred to as "The Latin Connection."

But of more importance to this growth has been the people of South Florida, more importantly, the area's entrepreneurs and labor force -- their management skills, their language skill levels and their bi-cultural ambiance.

The establishment of South Florida as a bi-cultural and bilingual community has been one of the principle factors in its development as a center of hemispheric finance, trade and tourism. This development has meant a better quality of life for all of the people of South Florida, Latin and non-Latin alike. All this has been fostered by the increases in Cuban and other Latin American populations to the South Florida area.

Historically, Hispanics of Cuban origin/descent have comprised the majority of Latins in South Florida. Although they continue to do so, the proportion of Cuban households have decreased from 87% in 1970 to 80% in 1980 to 65% in 1989. The number of households rose again from 1980 to 1983 as a result of the Mariel boatlifts, but the proportion of Central Americans, most notably Nicaraguan exiles, continues to increase. A similar trend is also seen with Latins from South American countries -- more and more are making South Florida their home.

Throughout this report, the reader will find that the Latin culture and the Spanish language are alive and well in South Florida. Spanish is the language spoken most often at home and on social occasions. The need for their children to speak Spanish, and their pride in their culture serves to reinforce Hispanic traditions.

The resulting bi-cultural and bilingual strength of the community, which is the combined blends of the Latin and non-Latin cultures in South Florida, is responsible for igniting the fuel of our present and future economic prosperity.

This section of the report discusses the history and development of South Florida's Latin market and cites the population figures/growth attributable to this development.

The following sub-section presents a short history of the Latin population in South Florida and the reasons for the Latin influence in South Florida.

B. HISTORY OF SOUTH FLORIDA'S LATIN MARKET

The Latin influence was first felt in South Florida in the late 19th century when numerous Spaniards and Cubans, employed in the cigar-making industry, settled in Key West. Due to its close proximity to Cuba (only 90 miles away), Key West seemed like the perfect new home for the immigrants.

Soon after their arrival, these newcomers intermarried with the local "conchs" (a term used by the residents of the Florida Keys to identify themselves). However, the lack of a fresh water supply in Key West, its inaccessibility by land and a major fire caused these Latins to relocate to Tampa, thus impeding the Latin community from flourishing in Key West. Nevertheless, the Latin influence is still visible today in the area's Spanish colonial architecture, the street names, and its local cuisine.

The next wave of Latin immigrants came from Cuba in 1959 after the success of Fidel Castro's revolution resulting in the ousting of the Batista government. Thousands of Cubans, many from upper and middle class families, fled their country and left behind not only their possessions but many family members. Many went to other countries such as Puerto Rico, Venezuela, Mexico and Spain, but the majority came to Miami. Here the new arrivals found not only the climate of their homeland but, in the prevalent thinking of those days, a point from which they would be able to make a quick return to their homeland and families when normal conditions were restored.

But the political and economic situations in Cuba worsened. The country once considered to be the most prosperous in the Caribbean was rapidly deteriorating into one characterized by political oppression causing more and more people seeking to flee the country. Thus, the influx of Cuban immigrants continued into the early 60's despite Castro's futile efforts to contain the exodus.

In 1962 diplomatic relations between the United States and Cuba were severed as a result of the Cuban Missile Crisis. Thus, those wanting to leave Cuba could not longer come directly to the United States. Instead, they had to re-route themselves through intermediary countries such as Spain and Mexico and wait for entry visas to the U.S.

This phase concluded in 1965 when Castro, burdened by a faltering and unproductive economy, re-opened the gates to freedom. Again, South Florida became the new home of thousands of Cuban political exiles. At first the immigrants came via a boatlift fundamentally organized by the Cuban exile community in Miami. This proved a dangerous venture and many lives and small vessels were lost. A safer, more orderly evacuation by air was organized. These "Freedom Flights" brought over 270,000 Cubans to Miami between 1965 and 1973.

But Miami was having problems of its own in the early 1960's. The U.S. economic recessions of 1959 and 1961, coupled with bad tourist weather, had stunted South Florida's economic growth and jobs were hard to find. Still, the Cubans came to this city they considered their mecca.

The U.S. government's solution to the problem was to relocate the immigrants. Thus, many Cubans were resettled in small pockets throughout the United States with a larger availability of jobs than in South Florida.

The dream of returning to a free Cuba remained in the minds of most Cubans. They longed to be reunited with family members left behind and reclaim their possessions. As economic conditions improved in Miami in the late 60's and early 70's, many of those relocated Cubans returned to Miami.

Eventually, the dream of returning to a free Cuba started diminishing and these Cubans began to establish permanent residency in South Florida. This dream became less important as they witnessed their children and grandchildren being born in the United States, and the desire to provide stability and comfort for their families predominated their struggle for success. The country of their exile had become their home.

Cubans had, from their arrival, shown their value as capable and industrious people. Local Hispanic-owned businesses soon began to sprout throughout Dade County to accommodate the needs of the Hispanic community, and foreign words such as *bodega* and *farmacia* soon became familiar sights to the residents of South Florida.

The ties of the South Florida community were soon tested. In 1980 Dade County received yet another sudden influx of refugees. This wave became known as the Mariel Boatlift, named after the port of Mariel, where 125,000 Cubans were embarked for South Florida in disorderly and precarious conditions. The new contingent arrived to a strained welcome, as it became known that Castro had included among the refugees a substantial number of criminals and undesirables. But the solidarity of the South Florida Cubans with their immigrant countrymen, and the impressive support extended to the new arrivals, ensured that these were incorporated into the community surprisingly quickly and with a minimum of disturbance.

Prosperity with a Latin flair became a unique and prominent South Florida characteristic, as did the Latin lifestyle of Miami. The Latin influence is evident in everything from food to architecture to music. The Hispanic community has helped transform Miami from a small city to a growing metropolis. Hispanics have taken an active role in everything from business to politics.

A few figures are illustrative of the predominance of the Hispanic community in local business. In 1988, *Hispanic Business* magazine published a listing of the top 500 Hispanic-owned businesses in the U.S. Almost one-third, or 31 of the top 100, are located in the Miami/Hialeah/Coral Gables area.

Based on the 1988 list published by *Hispanic Business* magazine, which includes sales figures for 1987, Hispanic-owned businesses in Dade County conducted more business than any other Hispanic business community in the United States, including those of Los Angeles and New York. Reported sales in Dade County were $2.6 billion for that year.

These figures confirm that South Florida has the most prosperous entrepreneurial Latin community in the country. The potential for maintaining economic growth remains considerable.

More recently, the primary influx of new Latin arrivals has been not from Cuba, but from Central and South America, specifically Nicaragua, El Salvador and Colombia. Dade County, specifically the Miami-Hialeah area, has the highest proportion of new immigrants. According to the Center for Immigration Studies, Dade County reported that 21.5 out of every 1,000 people were new immigrants. This compares to 11.5 for New York and 7.9 people for every 1,000 in Los Angeles.

In the past five years, South Florida has witnessed a change in the demographic composition of its Latin population. Although Cubans are still the predominant group of Latins residing in the area, an increasing number of Central and South Americans, specifically Nicaraguans and Colombians, have made South Florida their home.

The Sandinista Revolution has been a major contributing factor. South Florida's Nicaraguans, who now comprise the market's second largest Latin population after the Cubans, have realized a "never return" situation to their country due to the contra movement, and therefore have settled in South Florida as permanent residents. Like their Cuban counterparts, they too fled their homeland, leaving behind their possessions and family members. In addition, the economic instability in Mexico has been a major catalyst in the increasing number of Mexicans migrating to the South Florida area. Why do these Hispanics come to the U.S.? Primarily because they look to the U.S., and especially the South Florida area, as the "Land of Opportunity," offering them and their families a better life in terms of civil rights and financial improvement.

This transformation to an essentially bi-cultural culture and lifestyle, together with a strong economy and a free, elective system of government, have made a life in South Florida the goal of many Hispanics in other countries. People fleeing political unrest and economic instability in Central America, Argentina, Venezuela and Colombia seek a more stable future for their families, and businessmen in search of less restrictive conditions, all look to South Florida for their future.

C. OVERALL POPULATION OF DADE COUNTY: 1950 - 1989

The overall population of Dade County will have expanded dramatically between 1950 and 1989. This 39-year time period estimates an increase in total population of almost 1.6 million people.

From one decade to the next, population on the whole had steadily increased anywhere from 330,000 to 450,000 persons.

Currently, Strategy Research Corporation estimates the January 1, 1989 Dade County population at 2,079,300 persons.

DADE COUNTY POPULATION
1950 - 1989

Year	Population
1950	495,084
1960	935,047
1970	1,267,792
1980	1,625,781
1983	1,869,600
1989	2,079,300

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

The expansion of the population of Dade County has not been uniform: one of the causes of a major increase was the Mariel Boatlift of 1980 when more than 125,000 refugees arrived in the area. Since that time there has been a steady flow of arrivals from other Central and South American countries.

D. POPULATION CHANGE IN DADE COUNTY: 1950 - 1989

The total population of Dade County will have increased by approximately 453,500 persons between 1980 and 1989. This represents a 27.9% total increase in population. A similar growth rate (28.2%) is seen for the decade period 1970 - 1980.

RATE OF GROWTH
DADE COUNTY POPULATION
1950 - 1989

	Persons	Change
1950	495,084	
1960	935,047	88.9%
1970	1,267,792	35.6
1980	1,625,781	28.2
1989	2,079,300	27.9

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

From 1950 to 1960 the population of Dade County nearly doubled -- from 495,084 persons to 935,047 persons. This increase was representative of a growth rate equivalent to 88.9%.

E. THE LATIN POPULATION OF DADE COUNTY: 1970 - 1989

The Latin population of Dade County as of April 1, 1970 --according to the U.S. Bureau of the Census -- was 299,217 persons. This represented 23.6% of the total population of Dade County. By 1975, Strategy Research Corporation estimated that the Latin population of Dade County had reached 488,500 representing 32.8% of the county's population.

DADE COUNTY POPULATION
1970 - 1989

Year	Total Population	Latin Population	Percent Latin
1970	1,267,792	299,217	23.6%
1975	1,487,800	488,500	32.8
1980	1,625,781	664,500	40.9
1983	1,869,600	785,100	42.0
1989	2,079,300	879,500	42.3

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

By April 1, 1980 the U.S. Census reported Dade's Latin population at 664,500 persons -- almost 41% of the Dade County population.

As of January 1, 1989 Strategy Research Corporation estimates the Latin population at 879,500. This represents 42.3% of the total Dade County population of 2,079,300.

Within the past decade, it is important to note that the Latin population has begun an in/out migration pattern from Dade. Historically, in the 1960s, Latins came to Dade County, resettled and left (in and out migration). In the 1970s, migration was mostly in -- very little resettlement and out-migration of Hispanics. In the 1980s, there is an in/out migration. Although Hispanics are coming to Dade, many resident Latins are also relocating to Tampa, Orlando and other markets.

F. LATIN CONTRIBUTION TO DEMOGRAPHIC GROWTH: 1980 - 1989

From 1980 to 1989, the Latin population of Dade County will have more than tripled. A growth of 215,000 Latin persons will be realized, representing a growth rate of 32% for this nine-year time frame. Comparatively, the non-Latin population will have grown by only 25% (238,519 persons) during the same period. Thus, numerically, the Latin population in South Florida will have grown at almost the same rate as the non-Latin population from 1980 to 1989.

DADE COUNTY POPULATION GROWTH
LATIN VERSUS NON-LATIN
1980 - 1989

	1980	1989	Net Increase
Latin	664,500	879,500	215,000
Non-Latin	961,281	1,199,800	238,519
TOTAL	1,625,781	2,079,300	453,519

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

G. SOUTH FLORIDA LATIN POPULATION BY COUNTY

Dade and Broward Counties will have experienced significant growth between 1980 and 1989. The greatest percentage increase will occur in Broward County. This particular county will give rise to approximately 35,900 new Hispanic inhabitants, which will represent over an 89% increase of 1980's population of 40,300.

In terms of absolute numbers, Dade County, the largest county in the ADI in terms of Latin population, will show an increase of 215,000 Latins for the same period; a 32.3% increase.

LATIN POPULATION GROWTH
MIAMI ADI
1980 - 1989

County	1980 Latin Population	1989 Latin Population	1980-1989 Percent Increase	Percent Latin 1989
Dade	664,500	879,500	32.3%	42.3%
Broward	40,300	76,200	89.1	5.8
Monroe	7,200	7,860	9.2	11.0
TOTAL MIAMI ADI	712,000	963,560	35.3%	27.8%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

As a whole, the Miami ADI will experience an estimated growth of 35.3% between 1980 and 1989.

H. SOUTH FLORIDA LATIN POPULATION GROWTH BY COUNTY: 1970 - 1989

The Latin population in Dade, Broward and Monroe Counties has grown from 322,554 in 1970 to 712,000 at the time of the 1980 Census, to 963,560 currently -- an increase of nearly 200% since 1970.

SOUTH FLORIDA LATIN POPULATION
1970 - 1989

Year	Total Population	Latin Population	Percent Latin
1970	**1,940,478**	**322,554**	**16.6%**
Dade	1,267,792	299,217	23.6
Broward	620,100	15,502	2.5
Monroe	52,586	7,835	14.9
1980	**2,707,169**	**712,000**	**26.3%**
Dade	1,625,781	664,500	40.9
Broward	1,018,200	40,300	4.0
Monroe	63,188	7,200	11.4
1983	**3,048,800**	**840,300**	**27.6%**
Dade	1,869,600	785,100	42.0
Broward	1,114,100	47,800	4.3
Monroe	.65,100	7,400	11.4
1989	**3,464,000**	**963,560**	**27.8%**
Dade	2,079,300	879,500	42.3
Broward	1,313,100	76,200	5.8
Monroe	71,600	7,860	11.0

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

Throughout the years, Dade County has dominated the majority of the Latin population in South Florida. Currently the Latin population in Dade County represents approximately 91% of the Latin population in Dade, Broward and Monroe Counties combined.

I. NUMBER OF HOUSEHOLDS

There are 283,710 households in Dade County headed by Latins. These households represent 40.7% of all households in the market.

DADE COUNTY
HOUSEHOLD STATISTICS
1989

Population Segment	Population	Persons Per Household	Households	Percent Distribution
Latin	879,500	3.1	283,710	40.7%
Non-Latin	1,199,500	2.9	413,724	59.3
TOTAL	2,079,300	3.0	697,434	100.0%

Source: Bureau of the Census
Strategy Research Corporation

The average size of the Latin household is 3.1 persons, which is larger than that of the non-Latin household (2.9 persons per household).

J. LATIN POPULATION/HOUSEHOLDS -- TOTAL POPULATION

With more than 3.4 million total persons and 963,600 Latins, the latter currently constitute over one-fourth (27.8%) of the total Miami ADI population.

Overall, Dade County has the highest concentration of residents (2,079,300), followed by Broward County (1,313,100). Latins in Dade County constitute 42.3% of the total population base, while 5.8% of the population in Broward County is of Latin origin or descent. Latins in Monroe County account for 11% of Monroe's total population.

MIAMI ADI
HISPANIC POPULATION/HOUSEHOLDS -- TOTAL POPULATION
JANUARY 1, 1989

County	Hispanic Population (000)	Hispanic Households (000)	Percent Of Total Population	Total Population (000)
Broward	76.2	24.6	5.8%	1,313.1
Dade	879.5	283.7	42.3	2,079.3
Monroe	7.9	2.5	11.0	71.6
TOTAL	963.6	310.8	27.8%	3.464.0

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

There are approximately 310,800 Latin households in the Miami ADI; 283,700 (91%) are located in Dade County.

K. SUMMARY

The Latin population of South Florida continues to show overall sustained growth with an approximate increase of 32% in Latin population since 1980. The Miami ADI, which is comprised of three counties, contains nearly one million Latins (963,560 persons) or roughly 8% of the total U.S. Hispanic population.

The vigorous growth in the Latin population of the South Florida area carries significant implications:

(1) It produces a large and expanding market, with considerable spending power and increasing demand for consumer products.

(2) The South Florida market is accessible through various Spanish language mass media vehicles such as television, radio and newspapers.

(3) Latins who have lived in the South Florida area for numerous years, as well as those who are newcomers, continue to improve their quality of life by attaining higher levels of education, better jobs, and earning higher incomes.

(4) The prosperity of the South Florida Latin population in turn underlines the potential and the attractiveness of the South Florida market for other Latins from Central and South America, Mexico, and even from other U.S. cities.

III. MARKET PROFILE AND CHARACTERISTICS

An estimated 963,560 Hispanics currently live in the Miami ADI. What are the demographic characteristics of these residents? Are they young or old? How many were born in the United States? How long have they lived in the South Florida area? What are their Latin backgrounds -- how many are of Cuban origin/descent, and how many are there of other Hispanic backgrounds? What are their educational levels and occupations? How do they contribute to the economy of South Florida: what is their average yearly income and ultimately, their buying power?

The purpose of this section is to profile demographically the strength of the Hispanic community within the South Florida market.

A. COUNTRY OF ORIGIN -- HEAD OF HOUSEHOLD

1. Country/Area Of Origin -- Latin Market

Cubans are the dominant Hispanic nationality in the South Florida market, with 65.2% of the Hispanic heads of household currently being of Cuban origin or descent.

Households headed by persons from Central America currently represent the second largest percentage of the market's Hispanic population base (16.6%), which is mostly comprised of persons from Nicaragua. Other countries represented in this group include El Salvador, Honduras and Costa Rica. Heads of household of South American origin or descent represent the third largest group of Hispanics in South Florida (10.3%).

COUNTRY OF ORIGIN
OF HEAD OF HOUSEHOLD
AMONG LATINS

	1970	1975	1978	1980	1983	1985	1987	1989
Cuba	87.3%	84.7%	80.2%	79.9%	84.0%	78.1%	68.7%	65.2%
Central America	0.8	1.7	1.5	4.3	7.3	9.3	16.4	16.6
South America	4.9	2.4	5.9	6.2	5.1	8.2	9.7	10.3
Puerto Rico	2.9	6.9	7.4	5.7	2.3	3.0	2.9	4.8
Other	4.1	4.3	4.9	3.9	1.3	1.4	2.3	3.1
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

The proportion of Latin households headed by those of Cuban origin/descent has been steadily decreasing over the previous years. As indicated, a total of 65.2% of the Latin households in South Florida are currently headed by Cuban-Americans compared to 68.7% in 1987, 78.1% in 1985 and 84.0% in 1983.

Between 1970 and 1980 the proportion of Cuban households had also been declining (from 87% to 80%). This was a result of a rising number of people from Central and South America joining the Cuban community in South Florida. The increase in Cuban households from 1980 to 1983 reflects the arrival of approximately 125,000 Cuban refugees via the Mariel Boatlift in the spring of 1980.

In contrast, the proportion of Latin households headed by persons from countries in Central America has been increasing over the past years, with the greatest increase occurring between 1985 and 1987 (9.3% to 16.4%, respectively). From the period 1980 to 1989, South Florida's Central American population quadrupled (4.3% - 1980, 16.6% - 1989). The Sandinista Revolution has been a major contributing factor. South Florida's Nicaraguans, who now comprise the market's second largest Latin population after the Cubans, have realized a "never return" situation to their country due to the contra movement, and therefore have settled in South Florida as permanent residents.

The proportion of Latin heads of household from South American countries has also followed an increasing trend (10.3% in 1989, 9.7% in 1987, 8.2% in 1985 and 5.1% in 1983).

The recent increase in Central and South American households is largely due to the increasing attractiveness of South Florida in relation to continuing economic and political unrest in Central America, most notably in Nicaragua.

Although the percentage of Cubans has shown a decline in recent years, they are still coming to the United States. Many leaving Cuba are being granted political asylum, but the great majority are being permitted to join close relatives in accordance with a U.S. policy of family reunification. Under a recently revived immigration agreement, as many as 23,000 Cuban immigrants per year may be permitted to come to the United States. This governmental agreement also permits the return to Cuba of thousands of Mariel refugees deemed excludable by the U.S. because of criminal behavior or mental illness.

2. Number Of Persons By Country/Area Of Origin -- Latin Market

Of the estimated 1989 Dade County Latin population of 879,500 persons, approximately 573,434 reside in households where the head of household is from Cuba or has ancestors from Cuba.

NUMBER OF PERSONS
BY COUNTRY OF ORIGIN
OF LATIN HEAD OF HOUSEHOLD

Head Of Household's Country Of Origin/Descent	Number Of Persons
Cuba	573,434
Central America	145,997
South America	90,589
Puerto Rico	42,216
Other	27,264
TOTAL	879,500

Source: Strategy Research Corporation

It is also estimated that nearly 145,997 Central Americans and 90,589 South Americans reside in Dade County.

B. RESIDENCY STATUS

This section reveals several factors regarding the residency status of South Florida area residents such as their country of birth and the length of time that heads of household have been living in the South Florida area.

The number of Hispanics who have entered the United States is impressive. But this number does not measure the potential for future immigration to the U.S. from Latin America (Mexico, the Caribbean, South and Central America). Neither the INS nor the Justice Department provide statistics which reflect the true magnitude of this potential.

The figures in the following table present an eloquent comparison between the projected growth of the Latin American population and that of the United States and Canada.

From parity with the U.S. and Canada in 1950, the Latin American population has grown, in 1988, to more than one and a half times the U.S./Canadian population (436 million versus 272 million). In the year 2050, the Latin American population may be three times that of the U.S. and Canada (967 million versus 328 million, respectively).

POPULATION PRESSURE
IN LATIN AMERICA

	Population Latin America	Population U.S./Canada
1950	165 Million	166 Million
1988	436 Million	272 Million
2000	551 Million	296 Million
2050	967 Million	328 Million

Source: U.S. Bureau of the Census
Strategy Research Corporation

The underlying causes for immigration from Latin America to the U.S. have been economic, social and political. These causes remain basically unchanged. The pace of future immigration is likely to reflect this process as well as the increasing population pressure.

Because South Florida is within close proximity to Latin America, many Latins enter the United States through Florida. If the economic and political situations continue to be dismal, the influx of Latins to the South Florida area is seen as a relatively stable fact.

1. Place Of Birth -- Latin Market

South Florida Latin heads of household, aged 18+, were asked whether they were born in the United States or some other country.

Similar to 1987, more than nine out of ten South Florida Latin residents were born outside of the United States, although the recent percentage is slightly higher than that of 1987.

PLACE OF BIRTH
AMONG LATIN ADULTS (HEADS OF HOUSEHOLD)

	1987	1989
Other Country	95.4%	97.2%
U.S.A.	4.6	2.8
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

In 1987 a total of 95.4% of the Latins were born in another country (most notably Cuba), while in 1989, 97.2% of Latins stated that they were not native-born to the United States.

As stated earlier, the recent economic and political situations in Latin America have resulted in the immigration of thousands of Spanish-speaking people. Specifically, the political unrest in Central American countries have been major catalysts in increasing the number of recent arrivals in the South Florida area.

2. Length Of Residence In The South Florida Area

Latin and non-Latin heads of household were asked to state the length of time they had been living in the South Florida area.

The average length of residency in the South Florida area among Latin heads of household is 14 years, 3 months. The comparable length of residency for non-Latins is 23 years, 9 months.

LENGTH OF TIME HEAD OF HOUSEHOLD HAS BEEN LIVING IN DADE COUNTY

	1989	
	Latin	Non-Latin
Less Than 1 Year	5.6%	3.3%
1 - 3 Years	6.8	5.3
3 - 5 Years	6.7	3.8
5 - 7 Years	6.4	3.9
7 - 9 Years	18.9	3.2
9 - 11 Years	9.6	2.6
11 - 15 Years	7.9	5.2
15 - 20 Years	16.3	4.5
20 Years Or Longer	21.8	68.2
TOTAL	100.0%	100.0%
Average Length Of Residency	14 Years, 3 Months	23 Years, 9 Months

Source: Strategy Research Corporation

More than two-thirds of the non-Latins (68.2%) stated that they had lived in South Florida 20 years or longer. Comparatively, 21.8% of the Latins sampled had lived in South Florida for 20 years or longer. This again is indicative of recent immigration from Latin American countries, as well as migration within Florida and from other states.

A total of 5.6% of current South Florida Latins are newcomers, as they have resided in the area for less than one year; an additional 6.8% have resided in the area from one to three years. In total, 44.4% of Latins have lived in the South Florida area for less than ten years.

3. Place Of Residence Prior To Dade County -- Latin Market

The recent survey reveals that more than one-third of adult Latin heads of household (36.7%) lived in Cuba prior to establishing residency in South Florida. This is a decrease from the 49.4% level recorded in 1980.

Aside from Cuba, an additional 25.9% of current Latin residents had lived in other foreign countries. This percentage is twice that of 1980 (12.6%).

PLACE OF RESIDENCE
PRIOR TO DADE COUNTY
AMONG LATIN HEADS OF HOUSEHOLD

	1980	1989
Cuba	49.4%	36.7%
Other Foreign Country	12.6	25.9
New York/New Jersey	20.3	14.2
Puerto Rico	6.4	2.8
Other Area In U.S.	11.3	20.4
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Fourteen percent of current Latin residents were prior residents of the New York/New Jersey area, while 20% had relocated to Dade County from other parts of the United States.

C. HOUSEHOLD SIZE

1. Latin Market

The following statistics on the number of persons per household affirm a dynamic Latin presence. The average number of persons per Latin household in the South Florida area is currently estimated at 3.1, which is a relatively large household size.

The number of persons per Latin household currently reflects a decrease from previous years. One reason for the decrease from 1980 to 1985 is the fact that many of the new arrivals to the South Florida area via the Cuban boatlifts at that time were residing with established households prior to establishing households of their own.

NUMBER OF PERSONS PER HOUSEHOLD
AMONG LATINS

	1975	1980	1985	1989
One-Two	23.1%	26.1%	38.9%	40.6%
Three	21.1	23.3	23.6	25.4
Four-Five	40.2	42.0	28.2	23.5
Six Or More	15.6	8.6	9.3	10.5
TOTAL	100.0%	100.0%	100.0%	100.0%
Average Number Of Persons Per Household	3.8	3.6	3.2	3.1

Source: Strategy Research Corporation

At the present time, one out of four Latin households in the South Florida area (40.6%) consist of one or two persons. A total of 25.4% are three member households, while 23.5% are four to five person households.

Households with six or more individuals constitute 10.5% of the Latin households in the South Florida market.

2. Latin Versus Non-Latin Market

Latin households in the Miami ADI tend to be larger than the non-Latin household (3.1 persons versus 2.9 persons, respectively). Sixty percent of the Latin households are comprised of three or more persons, while the comparable figure for non-Latins is 51.5%.

NUMBER OF PERSONS PER HOUSEHOLD

	1989	
	Latin	Non-Latin
One-Two	40.6%	48.5%
Three	25.4	19.5
Four-Five	23.5	23.8
Six Or More	10.5	8.2
TOTAL	100.0%	100.0%
Average Number Of Persons Per Household	3.1	2.9

Source: Strategy Research Corporation

Almost half of the non-Latin households consist of one to two members compared to 40.6% of the Latin households that have one to two members.

The larger Latin household size can be attributed to a higher incidence of extended families that include grandparents, aunts and uncles, brothers and sisters, as well as a higher incidence of children.

D. AGE/SEX DISTRIBUTION

In terms of the age distribution of the Latin market, approximately 28% are under 18 years of age, while 54% are under the age of 35. A total of 46%, therefore, are 35 years of age or older.

In comparison to other markets with large quantities of Hispanics, the Latin population in South Florida is relatively older. For example, the average age of the Phoenix/Tucson Hispanic is 24.5 years; the average age of the Los Angeles Hispanic is 26.1 years; the average age among New York Hispanics registers at 27.8 years and the average age of a Hispanic residing in San Antonio is 27.0 years.

1989
MIAMI ADI
LATIN AGE/SEX DISTRIBUTION

	Latin Population (000)		Percent Distribution	
Males 18-24	42.2		4.8%	
Males 25-34	60.7		6.9	
Males 35-49	85.3		9.7	
Males 50-54	20.2		2.3	
Males 55-64	40.5		4.6	
Males 65+	32.5		3.7	
Males 18+		**281.4**		**32.0%**
Females 18-24	51.0		5.8	
Females 25-34	72.1		8.2	
Females 35-49	99.4		11.3	
Females 50-54	27.3		3.1	
Females 55-64	55.4		6.3	
Females 65+	44.0		5.0	
Females 18+		**349.2**		**39.7**
Teens (12-17)		**82.7**		**9.4**
Children (0-11)		**166.2**		**18.9**
TOTAL		**879.5**		**100.0%**

Median Age: 35.7

Source: Strategy Research Corporation

Adult males constitute 32.0% of the Hispanic population base, while adult females comprise 39.7% of the population.

E. OCCUPATION -- HEAD OF HOUSEHOLD

Due in part to South Florida's close proximity to Latin America, the area over the past several years, has emerged as an international trade and finance center showing an impressive economic expansion. This success has been notable in the areas of job generation, new business creation and the growth of young companies.

Approximately 41% of Latin heads of household are currently employed in white collar jobs as professionals, managers, owners, or in technical, clerical or sales positions. This represents an approximate 28% increase in white collar employment since 1978.

OCCUPATION OF
LATIN HEAD OF HOUSEHOLD

Occupation	1978	1989
White Collar		
Professional, Manager, Owner, Technical, Clerical, Sales	32.3%	41.5%
Blue Collar		
Craftsmen, Operatives, Service Workers, Laborers, Farmers	50.2	40.3
Other		
Retired/Students/Military/ Disabled	14.3	15.3
Unemployed	3.2	2.9

Source: Strategy Research Corporation

Forty percent of Latins are also currently employed in blue collar jobs as craftsmen, operatives, service workers, laborers or farmers. In 1978, a total of 50.2% of South Florida Latins were employed in blue collar positions.

A total of 15.3% of South Florida Hispanics are retired/students/disabled or in the military.

The unemployment rate among Latins in South Florida is low. Only 2.9% of Latin heads of household are currently unemployed.

South Florida is host to several large-scale employers. For example, the Dade County public school system employees 32,000 persons alone, coupled with the University of Miami which has 5,700 employees. Jackson Memorial Hospital, also located in Dade County, employees approximately 5,500 people. Miami is also corporate headquarters for the Burger King Corporation, which currently employs approximately 5,327 local area residents.

F. FULL-TIME EMPLOYMENT -- LATIN FEMALES

All Latin survey participants were asked if there were any females present in their household who work full-time.

A significant number of Latin females have entered the labor force in the past few years. Currently, 51.3% of Latin households have at least one female present who works on a full-time basis; 40.2% of the Latin households in 1983 had at least one full-time employed female present.

LATIN FEMALE
- FULL-TIME EMPLOYMENT

	1983	1989
Yes	40.2%	51.3%
No	59.8	48.7
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

The current figure is an impressive percentage for female employment, indicative of the continuing increase of women into the labor force. Traditionally, Hispanic women have taken on the role of homemakers, thus requiring them to stay at home. In addition to the opportunities in the South Florida market, acknowledgement of women working within the Latin society has become more readily acceptable by the second and third generation's new way of thinking.

G. LEVEL OF EDUCATION -- HEAD OF HOUSEHOLD

All heads of household were asked about the last level of school completed.

1. Latin Market

More than one-fourth of Latin heads of household currently in South Florida (26.0%) have completed some college or are college graduates. Miami is the home of the University of Miami as well as Florida International University and Miami-Dade Community College.

Meanwhile, almost half (45.8%) have attained a high school or *bachillerato* education (differs from the traditional domestic education in that it is a five year program).

LEVEL OF EDUCATION
OF LATIN HEAD OF HOUSEHOLD

	1983	1989
No Schooling	0.4%	0.7%
Elementary/Junior High School	36.0	27.5
High School/Bachillerato	39.1	45.8
College	24.5	26.0
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

These educational attainment figures for South Florida Latins are quite impressive compared to U.S. Hispanics as a whole. On average, just under 10% of all U.S. Hispanic adults have some college education or are college graduates (*1987 U.S. Hispanic Market Study*, Strategy Research Corporation).

2. Latin Versus Non-Latin Market

Currently, 41.0% of non-Latins have some university education or higher.

A similar percentage of Latins and non-Latins have the equivalent of a high school or *bachillerato* education.

LEVEL OF EDUCATION
OF HEAD OF HOUSEHOLD

	1989	
	Latin	Non-Latin
No Schooling	0.7%	0.3%
Elementary/Junior High School	27.5	10.8
High School/Bachillerato	45.8	47.9
College	26.0	41.0
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

H. HOUSEHOLD INCOME

Hispanics contribute vigorously to the South Florida economy. The average annual household income in 1989 among South Florida Latins is $31,042; the average annual income per non-Latin household is $38,419.

1989
HOUSEHOLD INCOME

	Latin	Non-Latin
Mean Income	$31,042	$38,419
Median Income	$29,304	$30,813

Source: Strategy Research Corporation

Compared to other Hispanic groups, Cubans have a much higher proportion of women in the work force, so family income is naturally higher. Also, Cuban households are more likely to be multi-generational. That increases family income by increasing the number of people old enough to work. It also lets both parents work while grandparents care for the children.

Components of income include earnings from wages, tips and self-employment, interest, dividends, alimony and child support payments, Social Security, public assistance, and other sources.

The next sub-section illustrates how this average household income figure translates into an impressive level of spending power.

I. LATIN BUYING POWER

In the South Florida market, there are an estimated 310,800 households headed by Latins. In Dade County there are approximately 283,710 households headed by Latins. Taking as a basis the mean average household income, the aggregate gross income for Dade County is $8.8 billion. The net income (reflecting buying power) is $7.8 billion. This figure was adjusted to be comparable with Market Statistics' *Survey Of Buying Power*.

This amount is augmented by those Latin households residing in Broward and Monroe Counties. The combined South Florida Latin buying power is estimated at $8.5 billion.

When compared to 1980, a dramatic increase in local buying power is seen. In 1980, the total South Florida buying power stood at $3.4 billion. Thus, in a nine year span, purchasing power has more than doubled.

LATIN BUYING POWER

	1980	1989
Dade County	$3.2 Billion	$7.8 Billion
Total South Florida	$3.4 Billion	$8.5 Billion

Source: Strategy Research Corporation

The current Latin buying power figure represents an impressive buying power and is approximately equal to the current GNP for Guatemala.

With the continuing influx of Latins into the South Florida area the purchasing power of Hispanics as a group will increase.

IV. LANGUAGE PATTERNS

Do Latins in the South Florida market differ from other U.S. Hispanics in terms of their language use? Has the use of the Spanish language changed any (increased/decreased) during this past decade?

Latins were asked a series of questions regarding:

- The First Language Learned To Speak
- The Ability To Speak/Read/Write Spanish And English
- The Language Which Is Spoken Most Frequently At Home/Work/On Social Occasions

To see if the South Florida market is responsive toward the need for bilingual language skills, respondents were also asked the degree of importance they placed on their children's ability to read and write both Spanish and English.

The South Florida Hispanic is indeed attuned to his/her language as the following subsections will demonstrate.

A. FIRST LANGUAGE SPOKEN

All Latin respondents were asked which language they first learned to speak. The first language spoken is usually preserved throughout one's lifetime and it often represents a cultural bond with that person's heritage. This is especially important after exposure to a new language or culture as many Latin immigrants to the United States have experienced.

Virtually all adult Hispanics (98.7%) presently living in the South Florida area first learned to speak Spanish.

1989
LANGUAGE FIRST LEARNED TO SPEAK
AMONG LATINS

	Percent
Spanish	98.7%
English	1.3
TOTAL	100.0%

Source: Strategy Research Corporation

Thus, just slightly more than 1% first spoke English in the home.

B. SPEAKING ABILITY -- SPANISH/ENGLISH

All Latin adults participating in the survey were queried regarding their present ability to speak both the Spanish and English languages. Selection from a 6-point rating scale which included the options -- very well, well, fair, poor, very poor, can't speak -- yielded the following results.

All of the Latins interviewed speak Spanish to some degree. Ninety-five percent (95.0%) of the Latins stated that they spoke Spanish either "very well" or "well." In direct contrast, only 1.0% stated that they spoke the language "poor/very poor."

1989
ABILITY TO SPEAK SPANISH/ENGLISH
AMONG LATINS

	Spanish	English
Very Well/Well	95.0%	32.5%
Fair	4.0	22.3
Poor/Very Poor	1.0	16.3
Can't Speak	0.0	28.9
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

With regard to the English language, slightly under one-third of the area's Latin adults (32.5%) rated their English language speaking ability as "very well/well." An additional 22.3% stated that they were only fairly able to converse in English; 16.3% rated their English language speaking ability as "poor/very poor." An estimated 29% of area adults cannot speak English at all.

C. READING ABILITY -- SPANISH/ENGLISH

Latin adults were also asked about their ability to read Spanish and English. Again, they were asked to utilize the 6-point rating scale (very well, well, fair, poor, very poor, can't read).

More than nine out of ten South Florida Latins (94.4%) read Spanish "very well/well." Less than 1% of Latin adults cannot read Spanish at all.

1989
ABILITY TO READ SPANISH/ENGLISH
AMONG LATINS

	Spanish	English
Very Well/Well	94.4%	34.5%
Fair	4.0	17.5
Poor/Very Poor	1.5	17.4
Can't Read	0.1	30.6
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Just over one-third of the Latins (34.5%) possess the ability to read English proficiently ("very well/well"). A total of 17.5% of the Latins stated that they read English on a ""fair" basis, while a similar amount indicated that their English language reading ability deserved a "poor/very poor" rating. Approximately three out of ten Latin adults (30.6%) in the South Florida area are not able to read English at all.

D. WRITING ABILITY -- SPANISH/ENGLISH

The proficiency of writing Spanish and English was measured in the same manner as the ability to speak and read these languages. Namely, Latins were asked to rate their Spanish and English writing abilities by using a 6-point scaling system (very well, well, fair, poor, very poor, can't write).

The ability to write Spanish is similar to that of speaking and reading it. That is, 93.8% of Latins commented that they were able to write Spanish "very well/well."

1989
ABILITY TO WRITE SPANISH/ENGLISH
AMONG LATINS

	Spanish	English
Very Well/Well	93.8%	32.5%
Fair	4.7	18.6
Poor/Very Poor	1.4	17.1
Can't Write	0.1	31.8
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Similarly, the ability to write English is at par with the ability of speaking and reading it. Specifically, a total of 32.5% of the Hispanic adults interviewed stated that they were able to write English "very well/well." Meanwhile, approximately one-fifth of these same respondents rated their English language writing ability as "fair," while 17% rated themselves "poor/very poor" on this attribute. An additional 32% of South Florida Latins cannot write English at all.

E. LANGUAGE SPOKEN AT HOME/WORK/ON SOCIAL OCCASIONS

The following is a summary of the language spoken most frequently by Latins in the South Florida area at various times.

Language is a key factor in the acculturation and adaptation of arrivals to a new country. It is also inextricably woven into the culture and traditions of the immigrant. It is for this reason that this sub-section represents some of the most important findings from the survey.

1989
LANGUAGE SPOKEN MOST FREQUENTLY
BY SOUTH FLORIDA LATINS
AT VARIOUS TIMES

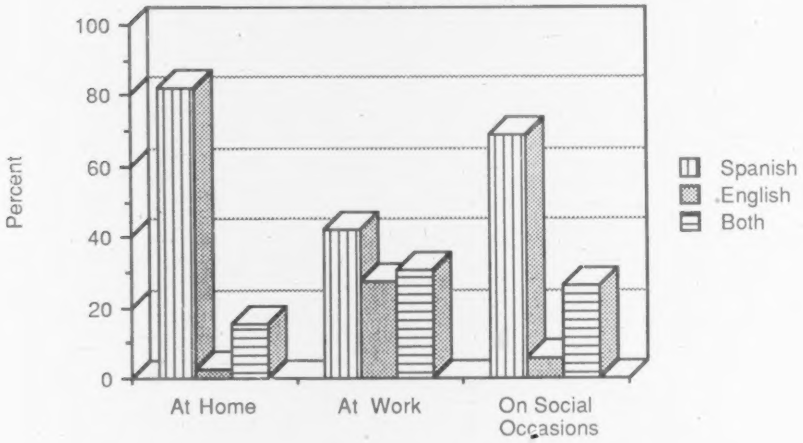
Language Spoken	At Home	At Work	On Social Occasions
Spanish	81.9%	42.2%	68.6%
English	2.6	27.3	5.5
Both	15.5	30.5	25.9
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

South Florida Hispanics are culturally affixed to their heritage. Whereas 81.9% of Latin adults speak Spanish most frequently in the home, another 15.5% speak both Spanish and English. Thus, the combined total of Spanish language usage in the home among South Florida Latins is 97.4%.

On social occasions, the majority of South Florida Latins (68.6%) also speak Spanish most frequently. The Spanish language is also used extensively in the work place with more than four out of every ten workers (42.2%) using Spanish most frequently during their daily routine.

LANGUAGE SPOKEN MOST FREQUENTLY
AT VARIOUS TIMES



Source: Strategy Research Corporation

1. At Home

Spanish continues to be the primary language spoken in the home.

Approximately 82% of South Florida Latin adults currently speak Spanish most frequently in the home. Comparatively, 76% of the Latins almost one decade ago (1979) stated that Spanish was the language spoken most frequently in their home.

LANGUAGE SPOKEN MOST FREQUENTLY
AT HOME
AMONG LATINS

	1980	1989
Spanish	75.6%	81.9%
English	3.4	2.6
Both	21.0	15.5
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Compared to almost ten years ago, the use of English still registers at approximately the 3% level.

Historically, the percentage of use of Spanish in the home prior to 1980 calibrated in the eighty percentile range. However, in the early to mid 1980s the percentages peaked at 90% and higher. These sharp increases were due mainly to the area's influx of Cuban refugees as well as Latins from economically unstable countries in Central and South America.

2. At Work

In addition to being asked which language they speak most frequently in the home, Latins were also asked which language they speak most frequently at work.

The use of Spanish in the work place as the primary language currently registers at 42.2%; a 36.6% level was recorded in 1980.

LANGUAGE SPOKEN MOST FREQUENTLY
AT WORK
AMONG LATINS

	Those Who Work	
	1980	1989
Spanish	36.6%	42.2%
English	14.0	27.3
Both	49.4	30.5
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

The primary use of English in the work environment also shows an increase over the nine-year period (14.0% - 1980, 27.3% - 1989).

3. On Social Occasions

At social gatherings or meetings, Spanish continues to be the predominant language spoken. More than two-thirds of Latins (68.6%) currently speak Spanish at social events. This compares to 57.6% of Latins in 1980.

LANGUAGE SPOKEN MOST FREQUENTLY
ON SOCIAL OCCASIONS
AMONG LATINS

	1980	1989
Spanish	57.6%	68.6%
English	3.9	5.5
Both	38.5	25.9
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

The use of English, however, remains virtually unchanged. Four percent of Latins in 1980 stated that they spoke English most frequently at social gatherings compared to 5.5% indicating so in the current survey measurement.

In the next sub-section, attitudes regarding language are explored.

F. ATTITUDES REGARDING LANGUAGE

In order to determine if the South Florida market is responsive toward the need for bilingual language ability, both Latins and non-Latins were asked the following questions:

> "How important is it to you that your children have the ability to read and write Spanish perfectly?"
>
> "How important is it to you that your children have the ability to read and write English perfectly?"

The possible options were:

- Very Important
- Somewhat Important
- Neither Important Nor Unimportant
- Not Very Important
- Not At All Important

In interpreting the following data, it appears that the South Florida market is very pragmatic about the need for language skills. Both English and Spanish are needed to maximize economic and social opportunities. The market senses that both languages are equally important for these reasons.

1. Spanish Language

Almost all Latins in the South Florida market (99.0%) feel that it is "very/somewhat important" for their children to read and write Spanish with perfection.

Almost six out of ten non-Latins (58.7%) feel that it is "very/somewhat important" for their children to learn Spanish as a second language. This can be seen as an indicator of the impact which the Hispanic community has had on the South Florida community as a whole. In other words, the value of knowing Spanish is evident among the majority of non-Latin residents.

1989
IMPORTANCE OF CHILDREN
READING AND WRITING
SPANISH PERFECTLY

	Latin	Non-Latin
Very Important	97.0%	31.7%
Somewhat Important	2.0	27.0
Neither Important Nor Unimportant	0.7	13.0
Not Very Important	0.1	13.6
Not Important At All	0.2	14.7
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

2. English Language

Utilizing the same 5-point scale used for the Spanish language skills question, all Latin heads of household were asked to rate the importance of their children learning the English language.

Latins place a great deal of importance on their children mastering English language skills. Virtually all Latins (98.1%) think it is "very important" for their children to learn to read and write English proficiently. An additional 1.7% place "somewhat importance" on this matter.

1989
IMPORTANCE OF CHILDREN
READING AND WRITING
ENGLISH PERFECTLY

	Latin	Non-Latin
Very Important	98.1%	96.9%
Somewhat Important	1.7	1.7
Neither Important Nor Unimportant	0.2	1.4
Not Very Important	0.0	0.0
Not Important At All	0.0	0.0
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

In addition to language as a cultural measure, social attitudes of Hispanics were also calibrated. These findings can be found in the following section.

V. SOCIAL ATTITUDES

In order to better understand language use and market profile data, Latins were queried with regard to their cultural lifestyles/preferences. Resultant data presents a view of the cultural patterns and lifestyles which characterize the South Florida market.

A. CULTURAL/LIFESTYLE MEASURES

To further define the Hispanics which comprise a particular market, Strategy Research Corporation has established a series of scaled statements which provide a reliable measure of the attitudes of Hispanics to certain aspects of their culture.

Respondents are presented with a series of affirmations dealing with family relations, assimilation and entertainment. They are asked to state the extent of their agreement with each affirmation utilizing a 5-point rating scale. The individual points on the scale are:

- Completely Agree
- Somewhat Agree
- Neither Agree Nor Disagree
- Somewhat Disagree
- Completely Disagree

The results of the scaled opinions are shown by "completely agree/somewhat agree" (top two box) responses.

Latins in the South Florida area present an impressive image with regard to their family and culture. In this regard, traditions have played a major role in shaping the area's present-day Hispanic community.

To an exceptional degree, Latins agreed emphatically with the affirmation, "It's Important To Get Together With Family Frequently On Social Occasions" (97.0%) and "I Like To Socialize With Latin Friends" (96.3%).

Another affirmation which emerged as a characteristic trait was that expressed in the statement, "I Like To Listen To Latin Music" endorsed by 94.7% of Latins.

Ninety-five percent of Latins also place importance on speaking the Spanish language at home: "It's Important That My Family Speak Spanish At Home."

The fifth and sixth most agreed upon statements concern aspects of assimilation. Eighty percent of Latins agreed with the statement, "I Like To Listen To American Music," while a similar percentage also agreed with the statement, "I Like To Socialize With American Friends."

These findings have relevance in two areas. First, they show that the majority of Latins in the South Florida market clearly manifest and reaffirm their identity as a Hispanic community. Second, as can be seen with time and influence, Latins in South Florida have developed a bi-cultural personality -- they are not a polarized community.

In sum, the Latin culture is not being lost in just one or two generations. It appears as though the sons and daughters of native Latins (and even the former's children) are not losing touch with the "old country." Most are adhering to their parent's culture and enjoying the non-Latin way of life.

1989
RANKING OF SOCIAL ATTITUDES
"COMPLETELY/SOMEWHAT AGREE"

	Latin	Non-Latin
It's Important To Get Together With Family Frequently On Social Occasions	97.9%	93.5%
I Like To Socialize With Latin Friends	96.3	74.3
It's Important That My Family Speak Spanish At Home	95.1	N/A*
I Like To Listen To Latin Music	94.7	48.3
I Like To Listen To American Music	80.5	91.1
I Like To Socialize With American Friends	79.2	93.1

* This question was not asked of the non-Latin sample.

Source: Strategy Research Corporation

Like Latins, non-Latins feel that "It's Important To Get Together With Family Frequently On Social Occasions" (93.5%).

More significant, however, is the evidence of the non-Latin acceptance of Latins and an appreciation of the Latin culture. Seventy-four percent of non-Latins affirmed agreement with the phrase, "I Like To Socialize With Latin Friends;" 48% also agreed that they "Like To Listen To Latin Music."

B. SELF IDENTIFICATION

Although many South Florida Latins may have been living in the United States for many years and indeed are American citizens, several still adhere to the Spanish language, traditions, and culture of their country of origin.

To quantify the number of Hispanics who presently live in the South Florida area as to their self identification, survey participants were asked, "How would you describe yourself?" The options read were:

- Hispanic First/American Second
- Equally Hispanic And American
- American First/Hispanic Second

1989
WOULD YOU CONSIDER YOURSELF...

	Percent
Hispanic First/ American Second	83.4%
Equally Hispanic As Well As American	12.1
American First/ Hispanic Second	4.5
TOTAL	100.0%

Source: Strategy Research Corporation

Over four out of every five Latins living in the South Florida market (83.4%) consider themselves "Hispanic First/American Second," while 12.1% consider themselves "Equally Hispanic As Well As American." Less than 5% of Latins consider themselves "American First/Hispanic Second."

VI. SHOPPING PATTERNS

Latins and non-Latins were asked to indicate which food stores they patronized in the past month; in this regard, average weekly grocery store expenditures were also measured. Additionally, all survey respondents were queried regarding their usage of cents-off coupons.

Do Latins and non-Latins differ in their use of mail order catalogs? How many have ordered something through the mail in the past twelve months?

Respondents were also queried as to where they usually purchase their musical records/albums/cassettes. A question on the use of a professional exterminating service in the past twelve months was also implemented.

A. FOOD STORE PATRONAGE

1. Stores Patronized -- Past Month

Latins and non-Latins were asked whether or not they had shopped at an American chain supermarket such as Publix or Winn Dixie in the past month. Additionally, all respondents were asked whether or not they had shopped at a Latin supermarket such as Sedano's. The patronage of Cuban/Latin *bodegas* was also determined.

A supermarket chain is classified as one which has at least six check-out counters, while a neighborhood grocery store *(bodega)* has approximately one to three check-outs. In addition, a chain supermarket has at least three to five stores in the same area.

a. Latin Market

Most Latin food store shopping is done in major supermarkets. Many of the major chains maintain outlets in Hispanic areas and actively cater to the Latin consumer. However, while most Latin shoppers do use major supermarkets as their primary food store, *bodegas* (small neighborhood grocery stores) serve as secondary stores are are quite important in distribution.

More than three-fourths of Latins (77.7%) in the current measurement had shopped at an American chain supermarket within the past month. A similar percentage (73.7%) had also shopped at a Cuban/Latin supermarket, while 49.4% shopped at least once at a *bodega*. American convenience stores such as 7-Eleven or Circle K were patronized by almost one-fourth of Latin adults interviewed.

TYPES OF FOOD STORES PATRONIZED
IN PAST MONTH
BY LATINS

	1980	1989
American Chain Supermarket	85.7%	77.7%
Cuban/Latin Supermarket	65.6	73.7
Cuban/Latin Bodega	49.2	49.4
American Convenience Store	32.0	24.2

Source: Strategy Research Corporation

Overall, Latin patronage at American supermarket chains and convenience stores has decreased from the levels recorded in 1980. On the other hand, patronage by Latins of Cuban/Latin supermarkets and *bodegas* have risen from the levels recorded in 1980.

b. Latin Versus Non-Latin Market

A total of 94.2% of non-Latins have shopped at an American chain supermarket in the past month compared to 77.7% of the Latins who reported patronage of an American chain supermarket.

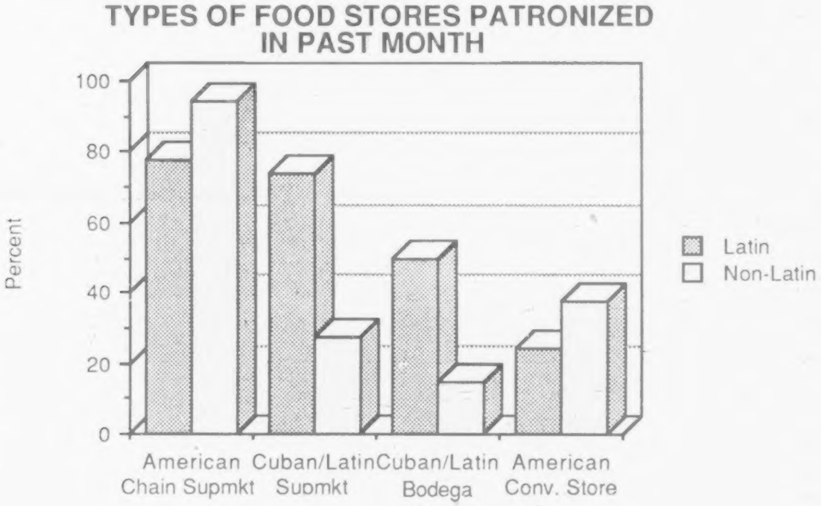
Although patronage of Cuban/Latin supermarkets and Cuban/Latin *bodegas* among non-Latins is substantially lower than American chain supermarkets, it is not altogether non-existent. More than one-fourth of the non-Latin sample (27.1%) reported patronage of Cuban/Latin supermarkets, while an additional 14.6% reported patronage of a Cuban/Latin *bodega* in the past month.

TYPES OF FOOD STORES PATRONIZED IN PAST MONTH

	1989	
	Latin	Non-Latin
American Chain Supermarket	77.7%	94.2%
Cuban/Latin Supermarket	73.7	27.1
Cuban/Latin Bodega	49.4	14.6
American Convenience Store	24.2	37.5

Source: Strategy Research Corporation

American convenience store patronage is approximately 50% higher among non-Latins than Latins (37.5% -- non-Latins, 24.2% -- Latins).



Source: Strategy Research Corporation

2. Weekly Food Store Expenditures

Latins and non-Latins alike were asked to estimate how much money (and/or food stamps) is spent weekly on purchases made for the whole family in all types of food stores.

Latins are currently spending $102.22 per week in food stores; the comparable expenditure for non-Latins is $80.67.

AVERAGE WEEKLY FOOD STORE EXPENDITURES

	Latin	Non-Latin
1980	$87.23	$66.99
1989	$102.22	$80.67

Source: Strategy Research Corporation

As has been the historic trend, the current average weekly food store expenditure among non-Latin households in South Florida has always been lower than that of Latins. This may be a reflection of smaller household size among non-Latins.

B. USE OF MAIL ORDER CATALOGS

Latins and non-Latins alike were asked, "Have you personally ordered anything through the mail in the last twelve months from a mail order catalog or service?"

In response, a total of 17.2% of Latins replied in the affirmative.

1989
USE OF MAIL ORDER CATALOGS
IN THE PAST TWELVE MONTHS

	Latin	Non-Latin
Yes	17.2%	38.3%
No	82.8	61.7
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Comparatively, a total of 38.3% of non-Latins have ordered merchandise through the mail from such companies as Spiegel, Lillian Vernon, Avon, et al.

C. COUPON USAGE

The use of cents-off coupons have largely become a part of American society. To most Hispanics, especially newcomers, they are still a relatively new form of saving money.

In this study, the use, frequency of use, and the preferred type of cents-off coupon was explored.

1. Incidence Of Use

Survey participants were asked, "When shopping, do you or any other household member ever use cents-off coupons?"

1989
USAGE OF CENTS-OFF COUPONS
WHEN SHOPPING

	Latin	Non-Latin
Yes	37.8%	75.1%
No	62.2	24.9
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Money-saving coupons are redeemed by 50% more non-Latins than Latins. Specifically, 37.8% of Latin households take advantage of cents-off coupons compared to 75.1% of non-Latin households.

2. Usage -- Past Three Months

All households indicating usage of price-saving coupons were asked how many times in the past three months they had been redeemed.

On average, Latin households had taken advantage of cents-off coupons 5.6 times within the past three months compared to 7.9 times among non-Latin households.

1989
NUMBER OF TIMES
CENTS-OFF COUPONS HAVE BEEN USED
IN PAST THREE MONTHS
AMONG COUPON USERS

	Latin	Non-Latin
1 - 2 Times	31.0%	13.5%
3 - 4 Times	16.7	20.9
5 - 7 Times	13.9	14.6
8 - 10 Times	20.5	15.8
11 - 12 Times	11.1	15.3
13 - 14 Times	1.8	1.3
15 - 19 Times	1.8	2.8
20 Or More Times	0.7	11.4
None	2.5	4.4
TOTAL	100.0%	100.0%
Average Number Of Times	5.6	7.9

Source: Strategy Research Corporation

A total of 15.4% of Latin households that used coupons had used them more than ten times in the past three months; the comparable figure for non-Latins for the same time frame registered at 30.8%.

3. Preferred Type Of Coupon

Money-saving coupons can be obtained/clipped from various sources -- through the mail, in/on packages, newspapers, magazines, etc.

In order to see if any differences or similarities exist among South Florida residents with regard to cents-off coupon procurement, the question was posed, "What type of cents-off coupons are preferred most?"

In order to further analyze the data, a Latin to non-Latin usage index is shown. An index of 100 indicates that Latin usage and non-Latin usage are identical. An index above 100 indicates that usage among Latin households is higher than non-Latin households.

Both Latins and non-Latins alike prefer to clip cents-off coupons from newspapers. The percentage of Latins who prefer newspaper coupons registers at 55.7% and the comparable figure for non-Latins is 69.7%.

Almost three-fourths more Latins than non-Latins prefer to receive coupons through the mail (32.5% -- Latins, 18.9% -- non-Latins). The Latin to non-Latin use index for this category registers at 172.

1989
PREFERRED TYPE
OF CENTS-OFF COUPONS

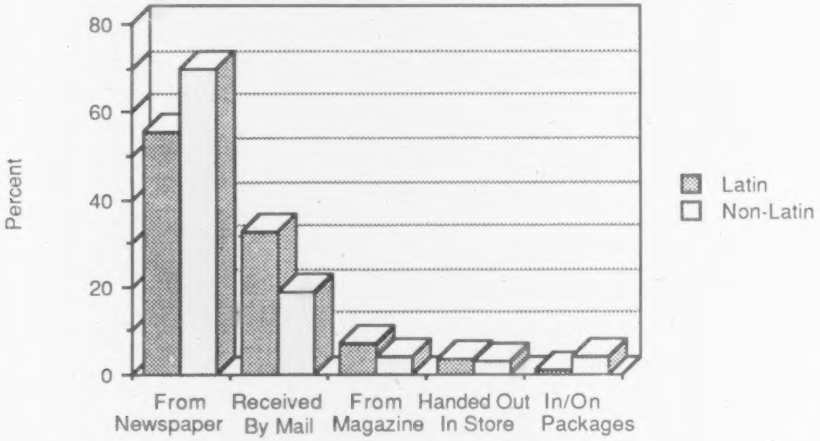
	Latin	Non-Latin	Index Latin To Non-Latin
From Newspapers	55.7%	69.7%	80
Received By Mail	32.5	18.9	172
From Magazines	7.0	4.2	167
Handed Out In Stores	3.8	3.0	127
In Or On Packages	1.0	4.2	24
TOTAL	100.0%	100.0%	

Source: Strategy Research Corporation

Latins, much more so than their non-Latin counterparts, also prefer cents-off coupons from magazines and those which are handed out in stores.

Coupons which come in or on packages are the least preferred type among both market segments.

1989
PREFERRED TYPE OF CENTS-OFF COUPONS



Source: Strategy Research Corporation

D. PURCHASE OF AUDIO RECORDINGS

Latins and non-Latins were asked, "Thinking about music, in what type of store are records/albums/pre-recorded tapes and cassettes usually purchased?"

Approximately 55% of all South Florida residents purchase audio recordings.

Record stores are by far the most popular places of purchase for records/albums/pre-recorded tapes and cassettes, with patronage registering higher among Latins than non-Latins (39.7% -- Latins, 32.4% -- non-Latins).

1989
TYPE OF STORE
WHERE RECORDS/ALBUMS/CASSETTES ARE USUALLY PURCHASED

	Latin		Non-Latin		Index Latin To Non-Latin
Purchase	55.5%		54.2%		
Record Store		39.7%		32.4%	123
Department Store		7.4		7.3	101
Discount Store		3.8		3.7	103
Record Club		3.6		7.8	46
Drug Store		2.6		0.7	371
Religious Book Store		1.1		1.3	85
Other		0.5		4.0	13
Do Not Purchase	44.5		45.8		
TOTAL	100.0%	*	100.0%	*	

* Multiple Response

Source: Strategy Research Corporation

The purchase of audio recordings at department stores and discount stores are the same for Latins and non-Latins.

E. USE OF PROFESSIONAL EXTERMINATING SERVICES

All survey participants were asked if their household had used a professional exterminating service in the past twelve months.

Both Latin and non-Latin households in South Florida demonstrate a similar level of use for pest control services. Specifically, 50.7% of Latin households had used the services of a professional exterminating company in the past year as have 48.0% of non-Latin households.

1989
USE OF A PROFESSIONAL EXTERMINATING SERVICE IN THE PAST TWELVE MONTHS

	Latin	Non-Latin
Yes	50.7%	48.0%
No	49.3	52.0
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

VII. RESTAURANT PATRONAGE

All survey participants were asked the following question regarding their patronage of non-fast food restaurants: "How often do you or any other member of this household eat at restaurants other than the fast food/quick service type?" Some examples of these types of restaurants include Tony Roma's, La Carreta, Denny's, etc.

In addition to household patronage of non-fast food restaurants, the favored types of foods were also gathered. Is there a preference for one type of food over another when eating out? Do these preferences differ between Latins and non-Latins?

1. Frequency Of Patronage

Patronage of non-fast food restaurants is high. Approximately 60% of all Latin households surveyed stated that there was at least one member present who patronizes non-fast food restaurants; nearly 80% of all non-Latin households can say the same.

On average, Latins eat at more formal/sit down restaurants approximately 2.16 times per month; non-Latins eat out at similar types of restaurants approximately once a week (4.20 times per month).

1989
FREQUENCY OF PATRONAGE
NON-FAST FOOD RESTAURANTS

	Latin		Non-Latin	
Ever Visit	**60.3%**		**79.8%**	
5 - 7 Times A Week		0.6%		3.6%
3 - 4 Times A Week		2.4		8.3
Twice A Week		6.8		12.9
Once A Week		15.9		14.1
2 - 3 Times A Month		12.9		15.4
Once A Month		16.5		15.7
Less Than Once A Month		5.2		9.8
Never Visit	**39.7**		**20.2**	
TOTAL	100.0%	60.3%	100.0%	79.8%
Average Times Per Month	2.16		4.20	

Source: Strategy Research Corporation

Formal restaurants are patronized at least once a week by 25.7% of Latins and by 38.9% of non-Latins. In general, 55% of all Latins eat at non-fast food restaurants at least once a month; the comparable figure for non-Latins approximates 70%.

2. Preferred Foods/Types Of Restaurants

Latins and non-Latins indicating patronage of non-fast food restaurants were asked to name the foods or types of restaurants they prefer most.

When eating out, the majority of Latins (61.1%) prefer to patronize Cuban restaurants -- be it a chain such as La Carreta or Latin American Cafeteria or a smaller family-owned neighborhood restaurant. The majority of non-Latins (54.3%) prefer to eat at restaurants such as Sizzler or Bennigan's which serve American fare.

Chinese food ranks second among Latins (35.9%), followed by seafood restaurants (31.1%). Seafood and Chinese restaurants are also the second and third favorites among non-Latins (38.6% and 37.4%, respectively).

1989
TYPE OF FOOD PREFERRED
WHEN EATING OUT IN NON-FAST FOOD RESTAURANTS

	Latin	Non-Latin
Cuban	61.1%	16.0%
Chinese	35.9	37.4
Seafood	31.1	38.6
American	24.4	54.3
Italian	17.4	36.1
Barbecue	14.4	14.5
Mexican	5.5	6.9
French/Continental	2.1	8.4
Japanese	1.5	2.9
Indian	0.0	0.8
Thai	0.0	0.6
Other Latin	5.3	0.4
Other	2.6	1.5
TOTAL	*	*

* Multiple Response

Source: Strategy Research Corporation

Among South Florida Latin residents, American, Italian and barbecue restaurants also hold a substantial edge over other types of restaurants. Italian and barbecue restaurants are also favorite choices among non-Latins.

Sixteen percent of non-Latins enjoy eating at Cuban restaurants.

VIII. PRODUCT USAGE

All survey participants were asked several questions regarding products their family may or may not use in their home. Usage of products within the following categories was explored:

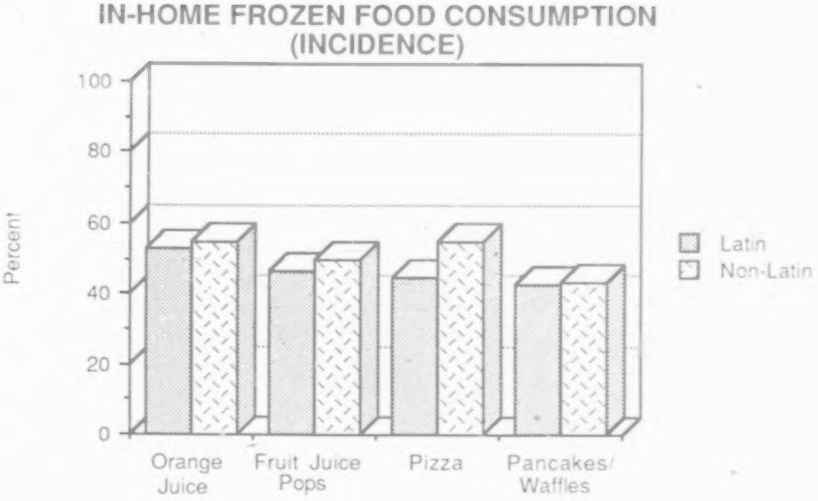
- Frozen Foods
- Dairy Products
- Meat Products
- Non-Alcoholic Beverages
- Assorted Packaged Food Item
- Health And Beauty Aids
- Assorted Household Products

All tables within this section show the usage/consumption among Latin and non-Latin households for each product in question. A Latin to non-Latin usage index is also shown. An index of 100 indicates that Latin usage and non-Latin usage are identical. An index above 100 indicates that usage among Latin households is higher than non-Latin households.

A. FROZEN FOODS

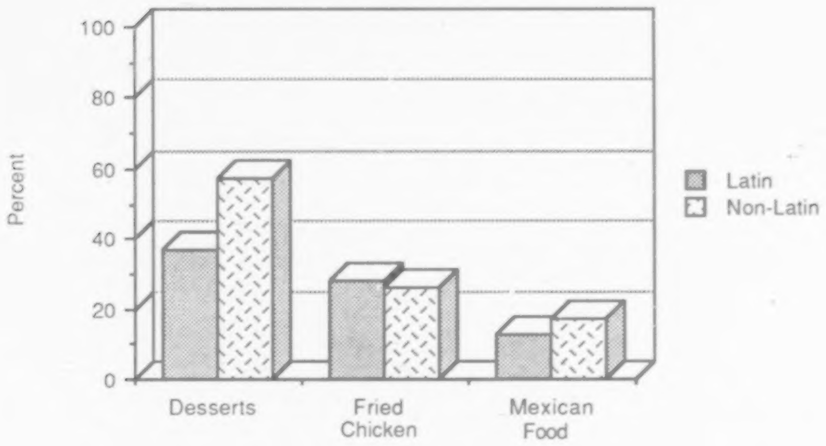
The household use of seven various types of frozen foods such as orange juice, desserts/confections, breakfast items, and entree type frozen foods was explored.

The following graphs show and compare the in-home consumption among Latin and non-Latin households of these frozen food products.



Source: Strategy Research Corporation

IN-HOME FROZEN FOOD CONSUMPTION (INCIDENCE)



Source: Strategy Research Corporation

There are some differences and some similarities in the incidence of use of these products when a comparison is made between Latin and non-Latin households in the South Florida market. Overall, slightly more Latin households than non-Latin households purchase frozen fried chicken (28.3% versus 25.9%, respectively). On the other hand, more non-Latin households in the South Florida market purchase frozen pizzas, desserts and frozen Mexican food products such as "burritos" or "enchiladas."

1989
IN-HOME FROZEN FOOD CONSUMPTION (INCIDENCE)

	Latin	Non-Latin	Use Index Latin To Non-Latin
Frozen Orange Juice	53.0%	54.7%	97
Frozen Fruit Juice Pops/ Confections	46.8	49.6	94
Frozen Pizza	44.4	54.6	81
Frozen Pancakes/Waffles/ French Toast	42.7	43.2	99
Frozen Desserts	37.0	57.3	65
Frozen Fried Chicken	28.3	25.9	109
Frozen Mexican Food	13.0	17.4	75

Source: Strategy Research Corporation

Frozen orange juice, and frozen breakfast foods such as pancakes, waffles and French toast are consumed in approximately the same percentage of Latin and non-Latin households.

Frozen pizza is consumed in 44.4% of Latin households and in 54.6% of non-Latin households.

B. DAIRY PRODUCTS

All survey respondents were asked about their household's purchase of:

- Fresh Milk
- Cream Cheese
- Sour Cream
- Egg Substitutes

The purchase of cream cheese is 20% higher among Latin households than among non-Latin households. Almost nine out of ten Latin households in the South Florida market purchase cream cheese compared to three-fourths of non-Latin households.

1989
IN-HOME DAIRY PRODUCT CONSUMPTION (INCIDENCE)

	Latin	Non-Latin	Use Index Latin To Non-Latin
Fresh Milk	98.2%	97.2%	101
Cream Cheese	89.8	75.0	120
Sour Cream	56.1	65.9	85
Egg Substitutes	14.2	18.3	78

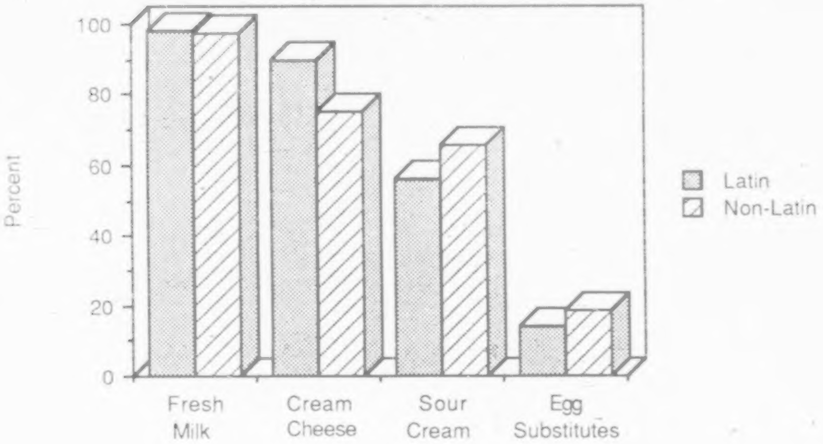
Source: Strategy Research Corporation

Fresh milk is equally popular in both Latin as well as in non-Latin households (98.2% and 97.2%, respectively).

Sour cream is used by approximately six out of ten South Florida households overall (Latin households -- 56.1%, non-Latin households -- 65.9%).

Egg substitutes are also purchased by a similar percentage of all households, however, their usage is much lower: Latin households -- 14.2%, non-Latin households -- 18.3%.

IN-HOME DAIRY PRODUCT CONSUMPTION (INCIDENCE)



Source: Strategy Research Corporation

C. MEAT PRODUCTS

The purchase of six different types of meats for the home was examined.

Overall, with the exception of canned hams, fresh and/or frozen meats are consumed more often in Latin households than in non-Latin households. For example, fresh or frozen sausage is consumed in 18% more Latin households than in non-Latin households. Specifically, 82.9% of Latin households indicated at-home consumption of fresh or frozen sausage compared to 70.5% of non-Latin households.

Beef and poultry are the most popular meats served in the homes of South Florida residents. Ninety-five percent of all homes purchase fresh or frozen poultry, while a greater percentage of Latins (96.2%) than non-Latins (89.5%) purchase beef for home preparation.

1989
IN-HOME MEAT CONSUMPTION (INCIDENCE)

	Latin	Non-Latin	Use Index Latin To Non-Latin
Fresh Or Frozen Beef	96.2%	89.5%	107
Fresh Or Frozen Poultry	95.0	94.6	100
Fresh Or Frozen Sausage	82.9	70.5	118
Fresh Or Frozen Seafood	81.3	79.7	102
Fresh Or Frozen Pork	79.3	69.9	113
Canned Hams	29.9	41.2	73

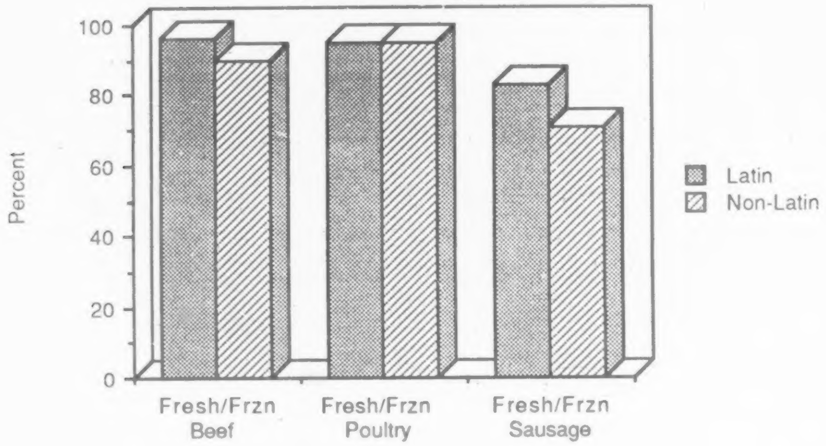
Source: Strategy Research Corporation

Although to a slightly lesser degree, seafood is also a popular item among area households. Seafood (fresh or frozen) is consumed in the homes of more than eight out of ten Latin homes (81.3%) and in 79.7% of non-Latin homes.

Fresh or frozen pork is prepared in 13% more Latin homes than non-Latin homes. A total of 79.3% of the Latins interviewed affirmed that pork was purchased for preparation in their home, compared to 79.7% of non-Latins who indicated the same.

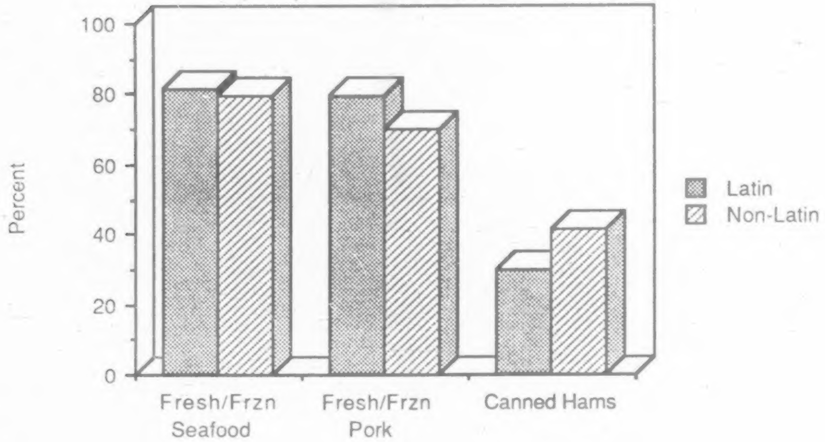
Three out of ten Latin households purchase canned hams; a 41.2% level was recorded among non-Latin households.

IN-HOME MEAT CONSUMPTION (INCIDENCE)



Source: Strategy Research Corporation

IN-HOME MEAT CONSUMPTION (INCIDENCE)



Source: Strategy Research Corporation

D. NON-ALCOHOLIC BEVERAGES

Latins and non-Latins were asked whether or not they or any other member of their household ever purchase select hot and cold beverages for consumption at home.

The consumption of fruit nectars among South Florida Latin households is almost twice as high as that of non-Latin households (72.8% versus 49.2%, respectively).

1989
IN-HOME BEVERAGE CONSUMPTION (INCIDENCE)

	Latin	Non-Latin	Use Index Latin To Non-Latin
Fruit Nectars	72.8%	49.2%	148
Hot Cocoa Mix	45.1	54.0	84
Diet Soft Drinks	42.9	59.5	72
Bottled Water	37.4	44.3	84
Energy Drinks/Thirst Quenchers	34.0	45.7	74

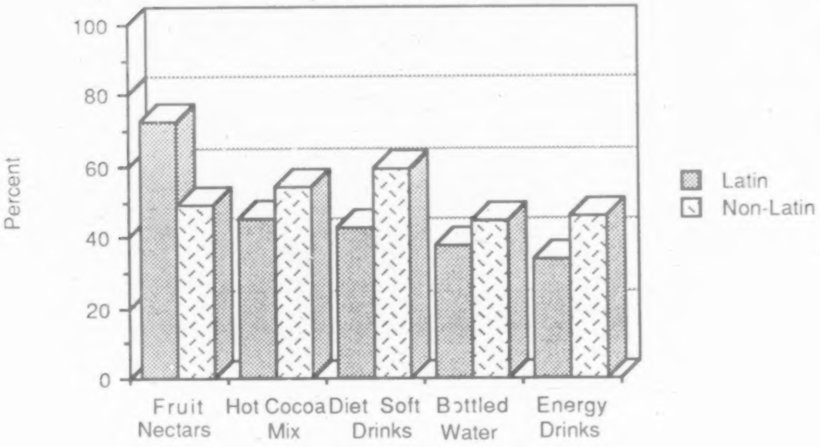
Source: Strategy Research Corporation

A total of 45.1% of Latin households buy hot cocoa mix for consumption in the home as do 54.0% of non-Latin households.

Similar to other markets, diet soft drinks register a higher level of consumption among non-Latin households in South Florida (59.5%) than among Latin households (42.9%).

Isotonic beverages (energy drinks/thirst quenchers) are purchased by 34.0% of Latin households and by 45.7% of non-Latin households.

More than one-third of South Florida Latin households (37.4%) buy bottled water for their family's at-home use compared to 44.3% of the non-Latin households.



IN-HOME BEVERAGE CONSUMPTION
(INCIDENCE)

Source: Strategy Research Corporation

E. ASSORTED PACKAGED FOODS

Compared to Latin households, non-Latin households demonstrate a higher product usage index for several types of packaged food products. For example, artificial sweeteners/sugar substitutes such as Nutrasweet® or Sweet & Low® are used by twice as many non-Latin households than Latin households (42.7% versus 21.2%, respectively). In this regard, salt substitutes are also used to a greater extent in non-Latin versus Latin households (22.2% to 11.8%, respectively).

One-fifth of all Latin households surveyed also indicated the preparation/use of flavored and seasoned rice mixes, as well as brownie and cookie mixes.

1989

IN-HOME ASSORTED PACKAGED FOODS CONSUMPTION (INCIDENCE)

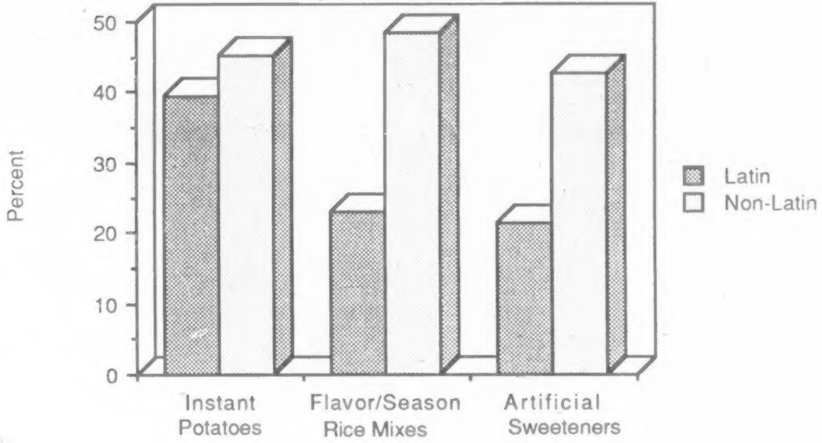
	Latin	Non-Latin	Use Index Latin To Non-Latin
Packaged Instant Potatoes	39.4%	45.2%	87
Flavored And Seasoned Rice Mixes	23.0	48.5	47
Artificial Sweeteners/ Sugar Substitutes	21.2	42.7	50
Brownie And Cookie Mixes	19.7	43.9	45
Breakfast/Snack/Granola Bars	16.8	36.5	46
Salt Substitutes	11.8	22.2	53
Pizza Mixes	6.7	13.6	49

Source: Strategy Research Corporation

Approximately four out of ten Latin households in the South Florida market prepare packaged instant potatoes -- a level similar to that of non-Latin households.

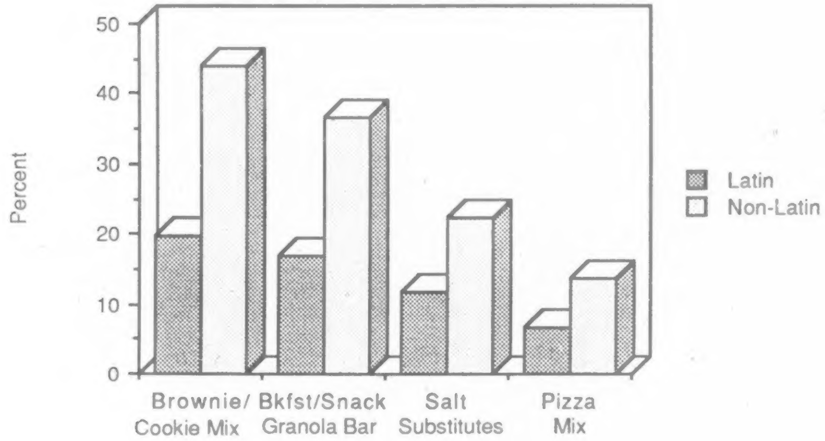
Breakfast/snack/granola bars are purchased by slightly less than one-fifth of Latins; approximately one-third of non-Latins purchase breakfast/snack/granola bars.

IN-HOME PACKAGED FOODS CONSUMPTION (INCIDENCE)



Source: Strategy Research Corporation

IN-HOME PACKAGED FOODS CONSUMPTION (INCIDENCE)



Source: Strategy Research Corporation

F. HEALTH AND BEAUTY AIDS

In the health and beauty aids category, Latins register a substantially higher incidence of use for all products compared to their non-Latin counterparts. Most prominent is the usage of sleeping pills. The Latin to non-Latin use index for sleeping pills registers at 200 indicating a 2:1 Latin to non-Latin level of use.

Hair styling mousse and hair coloring products are used in 60% more Latin households than non-Latin households. Specifically, 61.9% of Latins indicated that someone in their household used hair styling mousse; the comparable level among non-Latin households registered at 38.5%. Meanwhile, a total of 51.6% of Latins stated that at least one person in their household used home hair coloring products compared to 31.2% of non-Latins who responded similarly.

In addition to hair styling mousse and hair coloring products, Latins also post a substantially higher level of use for hair spray when a comparison is made to non-Latins. In this regard, incidence of use registers almost a 20 percentage point difference (77.7% -- Latins, 59.1% -- non-Latins).

An approximate 20 percentage point spread is also seen with regard to the use of disposable razors. A total of 89.1% of the Latin households interviewed claimed usage of disposable razors compared to 70.7% of non-Latin households.

1989
USAGE
HEALTH AND BEAUTY AIDS

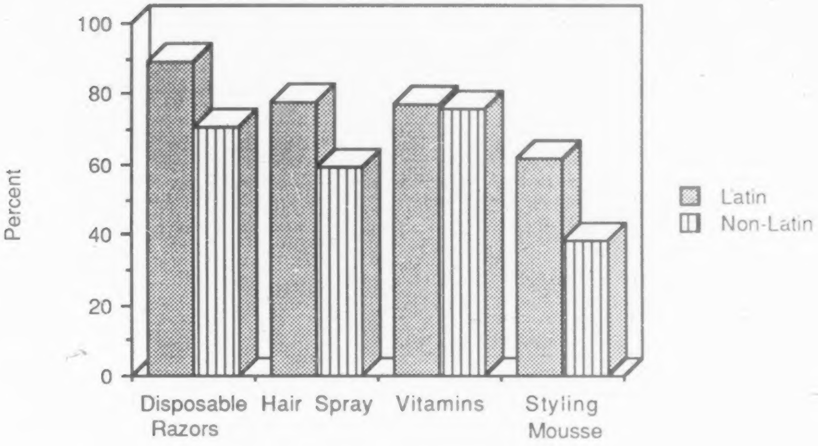
	Latin	Non-Latin	Use Index Latin To Non-Latin
Disposable Razors	89.1%	70.7%	126
Hair Spray	77.7	59.1	131
Vitamins	76.9	75.5	102
Hair Styling Mousse	61.9	38.5	161
Hair Coloring Products	51.6	31.2	165
Suntan And Sunscreen Products	51.4	42.9	120
Sleeping Pills	15.2	7.6	200

Source: Strategy Research Corporation

Slightly more than half of all Latin households in the South Florida area (51.4%) purchase suntan and sunscreen products; the comparable figure for non-Latins is 42.9%.

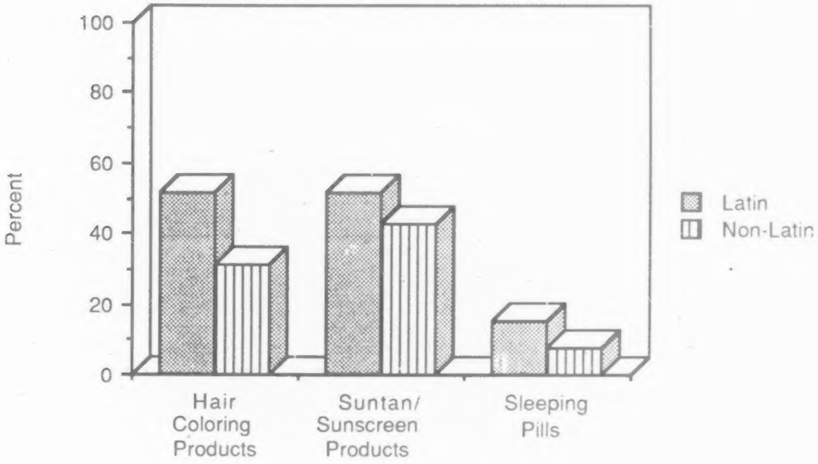
As for vitamins, usage is virtually the same among Latin and non-Latin households although the former does record a slightly higher level of usage (76.9% -- Latin households, 75.5% -- non-Latin households).

USAGE OF HEALTH AND BEAUTY AIDS



Source: Strategy Research Corporation

USAGE OF HEALTH AND BEAUTY AIDS



Source: Strategy Research Corporation

G. HOUSEHOLD PRODUCTS

The following statistics show the incidence of use for everyday household products ranging from pet food to smoking paraphernalia and bug sprays.

Typical of the South Florida market, there is a high level of use among both Latins and non-Latins for insecticides and insect repellents. For both product categories, usage registers higher among Latin households than among non-Latin households. The Latin to non-Latin use index for insecticides registers at 103, while the Latin to non-Latin use index for insect repellents registers at 111.

Latin households in the South Florida market also account for a much higher level of use for disposable lighters and cigars than their non-Latin counterparts. To exemplify, 37.7% of Latins interviewed indicated the use of disposable lighters, while 12.0% indicated that there was at least one person in their household who smoked cigars. Comparatively, 8.8% of non-Latin households have at least one member present who smokes cigars; usage of disposable lighters registers at 32.4%. The Latin to non-Latin use index for disposable lighters registers at 116, while the Latin to non-Latin index for cigars registers at 136.

1989
USAGE
HOUSEHOLD NON-FOOD PRODUCTS

	Latin	Non-Latin	Use Index Latin To Non-Latin
Insecticides	80.5%	78.1%	103
Disposable Plates	64.1	66.6	96
Disposable Cups	62.8	64.3	98
Insect Repellents	59.5	53.6	111
Disposable Lighters	37.7	32.4	116
Charcoal	37.0	39.6	93
Dog Food	27.0	31.8	85
Cat Food	12.1	23.2	52
Cigars	12.0	8.8	136

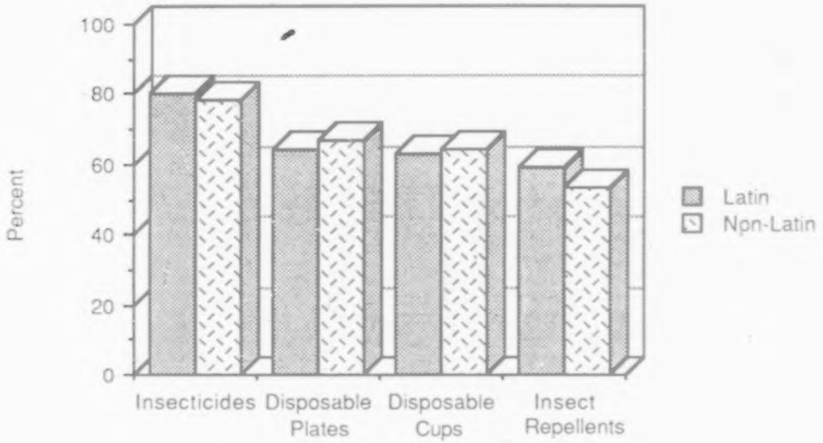
Source: Strategy Research Corporation

Both Latin and non-Latin households alike demonstrate a similar level of use for disposable paper plates and cups. Approximately two-thirds of all households use disposable paper plates, while a similar percentage also use disposable cups.

As cookouts are a year-round occurrence in the South Florida area, the incidence of use for charcoal registers about the same for both Latin as well as non-Latin households (approximately four out of ten households overall use charcoal).

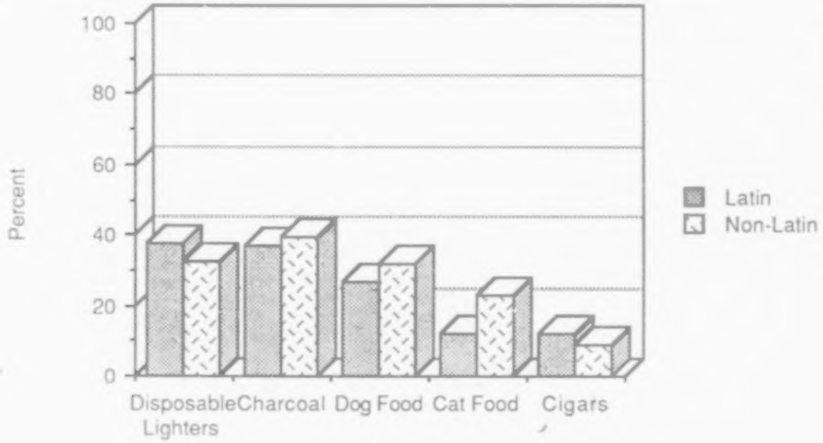
Approximately three out of ten Latin and non-Latin households purchase dog food; the purchase of cat food registers lower among both market segments.

USAGE OF HOUSEHOLD NON-FOOD PRODUCTS



Source: Strategy Research Corporation

USAGE OF HOUSEHOLD NON-FOOD PRODUCTS



Source: Strategy Research Corporation

IX. OWNERSHIP PATTERNS

This section of the Report presents data with regard to Latin and non-Latin ownership of various types of consumer products. Specifically, the survey sample was queried regarding automobile ownership as well as ownership of various electronic devices and sporting equipment.

A. AUTOMOBILE OWNERSHIP

How many South Florida Latins and non-Latins own an automobile? What is the make of automobile that registers the highest incidence among those that own?

Specifically, survey participants were asked, "Do you or anyone else in this household own an automobile?" Those that reported ownership were subsequently asked, "What make(s) of automobile(s) does this household have?"

1. Latin Market

Automobile ownership among Latins has increased since 1983. A total of 86.3% of Latins reported auto ownership in 1989, compared to 81.9% in 1983.

AUTOMOBILE OWNERSHIP
AMONG LATINS

	1983	1989
Yes, Own A Car	81.9%	86.3%
No, Do Not Own A Car	18.1	13.7
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Conversely, only 13.7% of the respondents do not currently have a car. The 1983 figure for non-ownership registered at 18.1%.

2. Latin Versus Non-Latin Market

How does ownership among Latins compare to that of non-Latins? The table below shows that automobile ownership among non-Latins is slightly higher than among Latins (89.6% vs. 86.3%, respectively).

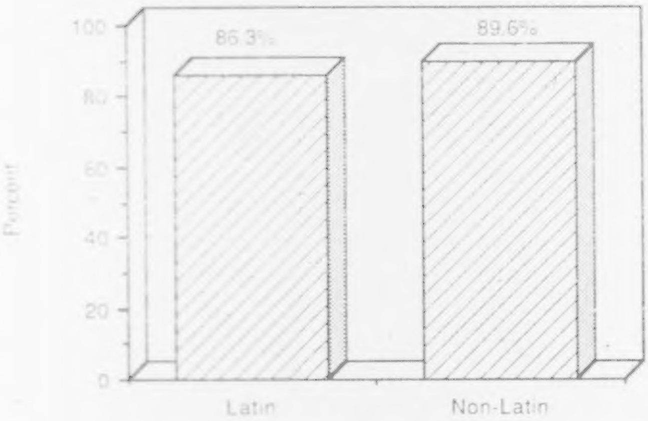
1989
AUTOMOBILE OWNERSHIP

	Latin	Non-Latin
Yes, Own A Car	86.3%	89.6%
No, Do Not Own A Car	13.7	10.4
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Thus, it is evident from the above table that the residents of South Florida are a mobile society, relying primarily on their own vehicles for transportation.

AUTOMOBILE OWNERSHIP



Source: Strategy Research Corporation

3. Make Of Automobile Owned

Which make of automobile is most owned by Latins? What is the comparison to non-Latins?

The most popular makes of automobiles among both Latins and non-Latins are Chevrolet, Ford, and Toyota.

MAKE OF AUTOMOBILE(S) OWNED

	1989	
	Latin	Non-Latin
Chevrolet	29.3%	22.4%
Ford	23.6	25.6
Toyota	12.2	12.7
Oldsmobile	9.4	11.4
Buick	9.3	10.8
Pontiac	6.7	4.6
Datsun/Nissan	5.4	9.1
Cadillac	4.6	6.8
Dodge	4.0	8.0
Chrysler	3.9	4.6

Continued. . .

MAKE OF AUTOMOBILE(S) OWNED
(CONTINUED)

	1989	
	Latin	Non-Latin
Honda	3.9	6.3
Mazda	3.9	2.3
Plymouth	2.7	4.3
Lincoln Mercury	2.6	9.2
Volkswagen	2.6	0.8
Volvo	2.0	2.2
American Motor	1.7	3.2
Mercedes Benz	1.5	2.2
Audi	1.4	0.9
Hyundai	1.4	1.1
Mitsubishi	1.2	1.5
Porsche	0.8	0.6
Isuzu	0.5	0.7
Subaru	0.5	0.3
Renault	0.3	0.3
BMW	0.2	1.2
Jeep	0.2	0.8
Peugeot	0.0	0.7
Fiat	0.0	0.4
Suzuki	0.0	0.3
TOTAL	*	*

* Multiple Response

Source: Strategy Research Corporation

More than one-fourth of the Latins (29.3%) own a Chevrolet compared to 22.4% of their non-Latin counterparts. Ford, on the other hand, registers a similar level of ownership among both non-Latins and Latins (25.5% and 23.6%, respectively). Both Latins and non-Latins show a similar ownership level for Toyotas (12%).

B. ELECTRONIC GOODS

1. Ownership

Next, all survey respondents were queried regarding their ownership of select electronic goods such as stereos, VCRs, microwave ovens, home computers, etc.

Of the electronic devices in question, the one which received the highest mention of ownership was a stereo. Over three-fourths of Latins as well as non-Latins own a stereo (77.6% and 78.4%, respectively).

Ownership of a VCR was reported by 55.5% of the Latins and 59.3% of the non-Latins interviewed. Microwave ovens can be found in almost half of Latin households (46.9%) and two-thirds of non-Latin households (66.0%).

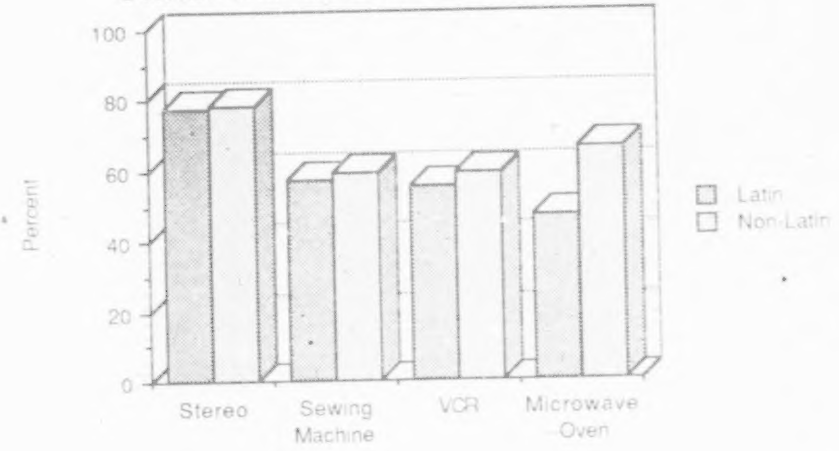
1989
INCIDENCE OF OWNERSHIP
ELECTRONIC DEVICES

	Latin	Non-Latin
Stereo	77.6%	78.4%
Sewing Machine	57.1	59.4
VCR	55.5	59.3
Microwave Oven	46.9	66.0
Automatic Dishwasher	32.9	40.0
Food Processor	27.9	43.8
Compact Disc Player	21.4	17.2
Home Computer	13.3	21.9

Source: Strategy Research Corporation

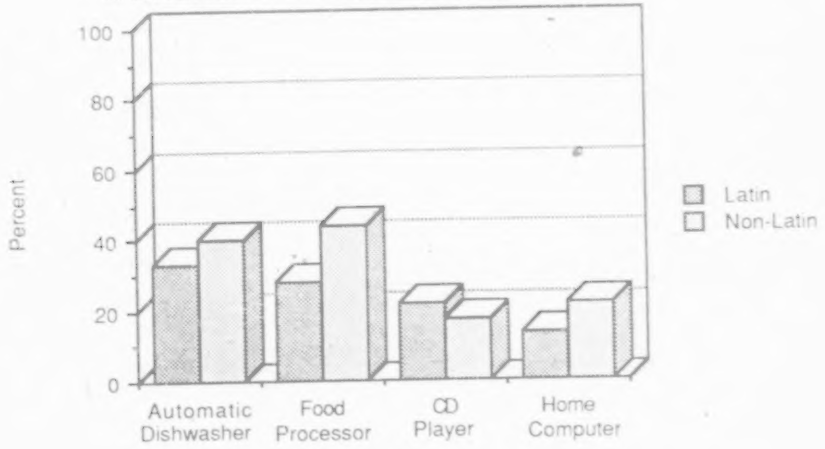
Ownership of a compact disc player registers higher among Latin households than non-Latin households. Compact disc players can be found in one-fifth (21.4%) of the Latin households compared to 17.2% of the non-Latin households.

OWNERSHIP OF ELECTRONIC DEVICES



Source: Strategy Research Corporation

OWNERSHIP OF ELECTRONIC DEVICES



Source: Strategy Research Corporation

The following table provides a Latin to non-Latin index for the ownership of these various electronic devices.

1989
INCIDENCE OF OWNERSHIP
ELECTRONIC DEVICES

	Index Latin To Non-Latin
Compact Disc Player	124
Stereo	99
Sewing Machine	96
VCR	94
Automatic Dishwasher	82
Microwave Oven	71
Food Processor	64
Home Computer	61

Source: Strategy Research Corporation

To illustrate, compact disc players are found in one-fourth more Latin households than non-Latin households, while stereos are found in an approximate equal percentage of households.

VCR and sewing machine ownership is also very strong comparatively. Only 6% fewer Latin households report the presence of a VCR, while 4% fewer Latins own a sewing machine.

One-fourth fewer Latin households than non-Latin households have microwave ovens. The index for automatic dishwashers registers at 82, indicating that 18% fewer Latins than non-Latins own this kitchen appliance.

2. Video Club Membership

All survey participants who reported ownership of a VCR were additionally asked if any of their household members belonged to a video club.

Almost three-fourths of South Florida Latins reported belonging to a video club, compared to slightly over one-half of their non-Latin counterparts.

1989
VIDEO CLUB MEMBERSHIP
AMONG THOSE WITH VCRs

	Latin	Non-Latin
Yes	71.4%	54.8%
No	28.6	45.2
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Although VCR ownership registered slightly higher among non-Latins, the incidence of belonging to a video club registers substantially higher among the Latin market segment.

C. RECREATIONAL EQUIPMENT

Are South Florida's residents active in sports activities? What type of sporting equipment do they own? This sub-section will present data concerning the ownership of various types of sports equipment by South Florida Latins and non-Latins.

The three most popular types of sporting equipment among Latins are hand guns (18.5%), weight lifting equipment (17.3%), and an inboard/outboard boat (9.3%).

Among non-Latins, the three types of sporting equipment that received the highest scores were weight lifting equipment (27.7%), hand guns (23.1%), and golf clubs (13.9%).

1989
OWNERSHIP OF SPORTING EQUIPMENT

	Latin	Non-Latin
Hand Gun	18.5%	23.1%
Weight Lifting Equipment	17.3	27.7
Inboard/Outboard Boat	9.3	9.2
Tent	4.3	10.6
Water Skis	3.7	6.6
Inflatable Boat	3.0	2.8
Golf Clubs	2.8	13.9
Sailboat	1.0	2.2
Rowboat	0.8	1.9
Canoe	0.4	1.0

Source: Strategy Research Corporation

Ownership of an inboard/outboard boat and an inflatable boat registered equally among Latins and non-Latins.

X. LEISURE TIME ACTIVITIES

How does the South Florida market spend its leisure time? What do its residents do for entertainment? How are funds allocated for recreation spent? In order to gain insight as to the leisure time activities of Latins and non-Latins in South Florida, a series of questions were asked pertaining to their attendance and viewership of sporting events, their movie theatre attendance, and the purchase of lottery/lotto tickets.

A. SPORTS ACTIVITIES

1. Spectator Sports (Paid Attendance)

All survey participants were queried regarding their attendance of six spectator sports. Specifically, they were asked, "In the past year, have you paid to see (as a spectator) any of the following professional sports activities?"

The choices were:

- Pro Football Game
- Pro Baseball Game
- Pro Basketball Game
- Soccer Match
- Car Races
- Boat Races

A pro football game was the most popular sport among both Latins and non-Latins. A total of 13.5% of the Latins and almost one-fourth (24.9%) of the non-Latins said they had paid to see (as a spectator) a pro football game in the past year. Baseball ranked second, with a similar percentage of Latins and non-Latins reporting paid attendance of a game in the past year (8.5% and 8.1%, respectively).

SPECTATOR SPORTS (PAID ATTENDANCE)
IN THE PAST YEAR

	1989	
	Latin	Non-Latin
Pro Football Game	13.5%	24.9%
Pro Baseball Game	8.5	8.1
Soccer Match	6.3	1.7
Car Races	5.5	4.3
Pro Basketball Game	4.1	4.4
Boat Races	2.9	4.2

Source: Strategy Research Corporation

The three most popular sports among Latins were football (13.5%), baseball (8.5%), and soccer (6.3%). The non-Latins preferred football (24.9%), baseball (8.1%), and basketball (4.4%).

By comparison, only 1.7% of the non-Latin market segment had paid to see a soccer match in the past year (compared to 6.3% of Latins). Historically, baseball and soccer (specifically, baseball in the Caribbean countries and soccer in Central and South America) are more popular sports in Latin America than football and basketball.

2. Television Viewership Of Sports

Next, all survey respondents were queried with regard to their television viewership of these same six sports. They were asked, "In the past year, have you watched any of the following on television?"

The highest ranking sports among Latins were baseball (61.3%), football (55.2%), and basketball (42.1%). Among non-Latins, football remained the leader at 76.1%, followed by baseball (60.9%) and basketball (56.9%).

SPORTS ACTIVITIES WATCHED ON TELEVISION IN THE PAST YEAR

	1989	
	Latin	Non-Latin
Pro Baseball Game	61.3%	60.9%
Pro Football Game	55.2	76.1
Pro Basketball Game	42.1	56.9
Car Races	34.9	39.1
Soccer Match	33.2	25.9
Boat Races	26.9	26.9

Source: Strategy Research Corporation

One-third (33.2%) of Latins watched a televised soccer match in the past year compared to one-fourth of their non-Latin counterparts (25.9%). Televised car races are slightly more popular among non-Latins than Latins (39.1% vs. 34.9%, respectively).

Boat races are equally as popular among Latins and non-Latins alike (26.9%).

B. MOVIE THEATRE ATTENDANCE

Do South Floridians go to the movies? How often do they go?

Taking into account the large percentage of survey participants who own VCRs and belong to video clubs, it is interesting to see what their frequency of movie theatre attendance is.

Movie theatre attendance registered slightly higher among non-Latins than among Latins. Almost one-half (48.6%) of the non-Latins surveyed said they go to the movies. This compares to slightly over one-third of their Latin counterparts (39.6%).

1989
FREQUENCY OF MOVIE ATTENDANCE
IN AN AVERAGE MONTH

	Latin		Non-Latin	
Go To The Movies	**39.6%**		**48.6%**	
One Time		21.1%		24.3%
Two Times		6.2		11.4
Three Times		4.2		3.8
Four Times		5.3		6.9
More Than Four Times		2.8		2.2
Do Not Go To The Movies	**60.4**		**51.4**	
TOTAL	100.0%	39.6%	100.0%	48.6%
Average Times Per Month	0.8		0.9	

Source: Strategy Research Corporation

A total of 24.3% of the non-Latins frequent the movies once a week (in a typical month). Twenty-one percent of the Latins reported the same frequency. Almost twice as many non-Latins as Latins go to the movies twice a month (11.4% vs. 6.2%, respectively).

Overall, Latins frequent the movie theatre once a month -- a level of frequency similar to non-Latins. The South Florida Latin rate of attendance is comparable to Hispanics in other U.S. markets. For example, Hispanics in the Phoenix/Tucson area also frequent the movie theatre once a month, while Hispanicss in New York go less than once a month. The average frequency of movie theatre attendance among New York Latins is 7.2 times a year.

C. PURCHASE OF LOTTERY TICKETS

Lotteries have historically been an attraction offered by various states (29 in total) such as New York, New Jersey, California, etc. Since January 1988, Florida has been added to the list of states which have an official lottery.

1. Incidence Of Purchase

Have Latins and non-Latins in South Florida accepted the lottery? Are they taking advantage of its potential pay off?

To offer some insight, all survey participants were asked, "Do you or anyone in this household ever buy lottery tickets or play lotto?"

PURCHASE OF LOTTERY TICKETS/PLAYING LOTTO

	1989	
	Latin	Non-Latin
Yes	78.9%	67.2%
No	21.1	32.8
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

The purchase of lottery tickets or the incidence of playing lotto registered higher among Latins than non-Latins. Over three-fourths (78.9%) of the Latins interviewed reported that they purchase lottery tickets or play lotto. Slightly over two-thirds of the non-Latins answered in like fashion.

2. Frequency Of Purchase

Those respondents who reported purchasing lottery tickets or playing lotto were subsequently asked how frequently they did so.

The table below shows that the highest percentage of participants are playing once a week. A total of 73.3% of the Latins are purchasing lottery tickets or playing lotto once a week, while 69.4% of the non-Latins are doing the same.

FREQUENCY OF PURCHASING LOTTERY TICKETS OR PLAYING LOTTO AMONG THOSE WHO PURCHASE

	1989	
	Latin	Non-Latin
Everyday	2.8%	1.6%
5 - 6 Times A Week	0.2	2.0
3 - 4 Times A Week	2.0	5.8
Twice A Week	7.1	3.5
Once A Week	73.3	69.4
Twice A Month	7.7	7.8
Once A Month	5.7	6.0
Less Than Once A Month	1.2	3.9
TOTAL	100.0%	100.0%
Average Times Per Week	1.21	1.24

Source: Strategy Research Corporation

Those respondents who purchase lottery tickets on a daily basis appear to be playing the "Cash 3" or one of the versions of the "Scratch-n-Win" games. Those who are purchasing tickets once a week seem to be aiming for the $2 million-plus jackpot.

On average, Latins participate in the Florida lottery 1.21 times a week. Their non-Latin counterparts play 1.24 times a week.

XI. USE OF HOSPITAL SERVICES

South Florida is home to some of the finest health care facilities in the country, many of which offer specialized services in the fields of cancer research, eye diseases, etc.

All survey participants were asked, "In the past year, have you or any other member of this household used any of the following hospital services?"

The particular services in question were:

- Outpatient (Lab Work, X-rays)
- Outpatient/Ambulatory Surgery
- Emergency Department
- In-Patient (Hospitalization for 24 hours or longer)

The following table shows the results of this inquiry.

USAGE OF HOSPITAL SERVICES WITHIN THE PAST YEAR

	1989	
Type Of Service	Latin	Non-Latin
Emergency Department	20.6%	21.5%
In-Patient	18.8	23.7
Outpatient	18.3	37.0
Outpatient/Ambulatory Surgery	11.5	10.1

Source: Strategy Research Corporation

The most commonly-used hospital services among Latins were the emergency department (20.6%), followed by in-patient (18.8%) and outpatient (18.3%).

Conversely, non-Latins reported more use of outpatient services (37.0%), followed by in-patient (23.7%) and emergency departments (21.5%).

XII. THE HISPANIC BUSINESS COMMUNITY

Overall, South Florida's business community is a thriving sector of the economy. The diversification of its non-agricultural components lend to this flourishment: construction -- 5%, manufacturing -- 12%, transportation, communications, and public utilities -- 8%, trade -- 27%, finance, insurance, and real estate -- 8%, services -- 27%, government -- 13%.

Compared to the nation's other metropolitan areas, Miami ranks first in terms of the number of Hispanic-owned businesses, boosted by a Cuban population more than twice as likely to start its own business/firm as others of Spanish heritage.

Cuban entrepreneurs have helped to make Miami the city with the highest concentration of Hispanic businesses in the nation. With 42.9 Hispanic-owned businesses per 1,000 residents of Hispanic origin/descent, Miami surpasses even Los Angeles, which has more Hispanics and more Hispanic-owned businesses but not as high a concentration. Cubans are the most active entrepreneurs, with a rate of 46 businesses per 1,000 people.

Hispanic businesses are concentrated in major metropolitan areas, with just four areas -- Miami, Los Angeles, New York and San Antonio -- accounting for nearly one-third of all Hispanic businesses in the nation.

In June 1988, *Hispanic Business* magazine published a listing of the nation's 500 leading Hispanic-owned corporations, ranked in terms of sales. These 500 businesses accounted for sales over $8.1 billion and total employees numbering 64,747.

Almost one-third, or 31 of the top 100 businesses are located in the Miami/Hialeah/Coral Gables area. The following table lists those firms in the Miami ADI with sales of $10 million and higher. Bacardi Imports, located in Miami, is the nation's most profitable Hispanic-owned business in terms of sales -- in 1987 sales totalled $500 million. Sedano's Supermarkets, with total sales of $154 million, ranks fourth among the nation's 500 largest. Sedano's Supermarkets is also located in Miami, as is Gus Machado Enterprises, Inc. -- the sixth largest Hispanic-owned business in terms of sales ($133 million). Numerous other Hispanic-owned businesses are located with the South Florida market, most notably in Dade County.

RANKING OF SOUTH FLORIDA'S HISPANIC-OWNED CORPORATIONS WITH ANNUAL SALES OF $10 MILLION OR MORE AMONG THE NATION'S 500 LARGEST

1987 Rank	Name Of Company	Location	Type Of Business	Number Of Employees	Year Started	1987 Sales (000)
1	Bacardi Imports, Inc.	Miami	Import/Dist. Bacardi Rum/Wine	229	1944	500.00
4	Sedano's Supermarkets	Miami	Retail Groceries	1200	1962	153.95
6	Gus Machado Enterprises, Inc.	Hialeah	Auto Dealership	272	1984	132.75

Continued. . .

RANKING OF SOUTH FLORIDA'S HISPANIC-OWNED CORPORATIONS WITH ANNUAL SALES OF $10 MILLION OR MORE AMONG THE NATION'S 500 LARGEST

(CONTINUED)

1987 Rank	Name Of Company	Location	Type Of Business	Number Of Employees	Year Started	1987 Sales (000)
7	Kaufman & Roberts	Miami	Retail Appliances/ Electronics	702	1975	123.00
10	Northwestern Meat Inc.	Miami	Meat & Seafood Dist.	90	1961	108.00
13	Capital Bancorp	Miami	Banking Services	574	1974	84.20
15	Republic National Bank of Miami	Miami	Banking	826	1965	77.13
20	American International Container	Miami	Glass Container Dist.	129	1976	67.60
23	Eagle Brands Inc.	Miami	Beer Distributorship	162	1984	64.00
25	DeArmas Publishing Group	Miami	Magazine Publisher	283	1963	60.80
31	Gator Industries	Hialeah	Shoe Manufacturer	1530	1969	48.00
32	Overseas Corp.	Miami	Real Estate Dev.	63	1971	48.00
34	Business Men's Insurance Corp.	Miami	Life & Health Insurance & Sales	68	1973	46.80
35	Banana Services, Inc.	Coral Gables	Banana Importer	12	1981	44.51
39	Ford Midway Mall	Miami	Auto Dealership	123	1959	40.88
41	Overseas Electronics Superstores	Miami	Electronic Appliances	60	1981	38.00
47	Bared Company, Inc.	Miami	Mechanical Contractor	200	1967	35.00
49	Avanti Press Inc.	Miami	Web Printing	285	1965	34.00
52	Gato Distributors	Miami	Wholesale Beer Dist.	110	1986	33.00
53	Mason Distributors, Inc.	Miami	Generic Drugs/ Vitamins	226	1967	31.50
58	Related Companies of Florida	Miami	Real Estate Dev.	250	1979	30.00
61	Generalbank, FSB	Coral Gables	Savings & Loan	185	1980	29.77
62	American Metals Service, Inc.	Miami	Metal Dist.	44	1968	29.50
67	Metro Ford, Inc.	Miami	Auto Dealership	80	1983	27.71
70	BEC Construction Corp.	Miami	General Construction	80	1970	27.00
72	Mat Chemicals, Inc.	Hialeah	Chemical Dist.	37	1977	26.80
75	Injection Footwear Corp.	Miami	Shoe Manufacturing	580	1960	26.00
80	Refricenter of Miami Inc.	Miami	Air Conditioning Supp. & Ser.	65	1971	23.00
81	De La Torre Imports	Miami	Shoe Imports	12	1975	22.74
84	El Dorado Furniture Corp.	Miami	Retail Home Furnishing	200	1967	22.00
95	Banner Beef Co.	Miami	Dist. Meat/Seafood	58	1968	20.00
104	Rivas Realty of Florida, Inc.	Miami	Real Estate Sales	43	1979	18.47

Continued. . .

RANKING OF SOUTH FLORIDA'S HISPANIC-OWNED CORPORATIONS WITH ANNUAL SALES OF $10 MILLION OR MORE AMONG THE NATION'S 500 LARGEST

(CONTINUED)

1987 Rank	Name Of Company	Location	Type Of Business	Number Of Employees	Year Started	1987 Sales (000)
105	ATX Corporation	Coral Springs	Telegraph Co.	8	1986	18.00
110	Terrinvest, Inc.	Miami	Housing Dev.	47	1977	17.46
119	All Star Investment Realty, Inc.	Miami	Real Estate Sales	45	1986	16.20
120	Church & Tower of Florida, Inc.	Miami	Engineering Contractor	300	1969	16.10
123	Rowland Coffee Roasters	Miami	Coffee Roaster	84	1960	16.00
135	North Gables Hospital	Coral Gables	Health Care	180	1984	14.70
137	Graphic Productions Co.	Miami	Printers/Lithographers	110	1974	14.51
141	Computer Express	Miami	Computer Sales & Service	25	1983	14.00
142	Gancedo Lumber Co.	Miami	Lumber	90	1969	14.00
144	Systems Devices & Supplies Inc.	Miami	Office Equipment	155	1960	14.00
148	Stair Cargo Services, Inc.	Miami	Int'l. Freight Forwarders	246	1977	13.51
151	Continental Bank of Miami	Miami	Banking Services	117	1974	13.48
155	Garcia-Serra & Blanco Advertising	Coral Gables	Advertising	31	1982	12.72
158	B/D X-Ray & Medical Equip.	Hialeah	Medical Equip. Sales	46	1978	12.50
165	Miami Savings Bank	Miami	Banking Services	110	1973	11.56
167	Hollywood Travel, Inc.	Hollywood	Travel Services	46	1962	11.50
169	Tropical International	Miami	Auto Parts	52	1977	11.40
179	AmerInsurance, Inc.	Miami	Insurance Agency	31	1962	10.86
180	Interamerican Engineers/ Constr.	Miami	General Contractors	155	1980	10.85
181	Miramar Electric Supply Co.	Miami	Electrical Whsl.	25	1974	10.80
182	Spillis Candela & Partners Inc.	Coral Gables	Interior Design	155	1926	10.60
183	Florida Lumber Co.	Miami	Lumber	66	1967	10.50
189	Caribe Avionics	Miami	Aviation Industries Service	70	1976	10.00
191	Florida Radio & Appliance Corp.	Miami	Appliance/Furniture Dist.	25	1980	10.00

As these statistics show, the Cuban presence is a vital component of South Florida's economy, and its impact will multiply as more Cuban refugees settle here.

XIII. EXECUTIVE SUMMARY

- South Florida has the third largest Latin population in the U.S., following Los Angeles and New York.
- The Latin population of Dade County continues to increase -- most recently stimulated by non-Cubans. The current Dade County Latin population is 879,500 persons. Including Broward and Monroe Counties, the South Florida Latin population approximates 963,560.
- Dade County's Latin population represents 42.3% of the county's total population.
- There are presently 283,710 households in Dade County headed by Latins, representing 41% of all Dade County households.
- The average number of persons per Latin household in South Florida is 3.1 persons, compared to 2.9 per non-Latin household.
- Currently, approximately 65% of the heads of household are Cubans; 17% are Central Americans, and 10% are South Americans.
- 97% of Latins were born in another country.
- The average length of residency in the South Florida area among Latin heads of household is 14 years, 3 months. The comparable length of residency for non-Latins is 23 years, 9 months.
- The median age for South Florida Latins is 35.7 years. Approximately 54% of the Latin market is under the age of 35, while 46% are 35 years of age or older.
- 42% of Latin heads of household hold white collar jobs, and 40% hold blue collar positions.
- More Latin females have entered the labor force. Currently, 51% of the Latin households have at least one female who works on a full-time basis outside the home. In 1983, the comparable figure was 40%.
- Along with other evidences of progress in the community, educational levels continue to rise. Presently, 26% of Latin heads of household in South Florida are college educated.
- Probably the most dramatic evidence of well-being in the Latin community has been the surge in annual income, which grew from an average of $22,356 in 1980 to a present annual average of $31,042; the comparable figure for non-Latins is presently $38,419.
- This represents an adjusted annual buying power for Dade County Latins of $7.8 billion, and for the tri-county ADI -- $8.5 billion.
- Virtually all of the area's Latin heads of household first learned to speak Spanish.
- 29% of Latins cannot speak English; 31% cannot read English and 32% cannot write English.

- Spanish is the primary language and the use of it has increased since 1980.

  82% now speak Spanish most frequently at home;
  69% now speak Spanish most frequently on social occasions;
  42% now speak Spanish most frequently at work.

- Latins attach great importance to preserving their language; 97% feel that it is extremely important for their children to read and write Spanish perfectly.

- In addition to language, Latins emphasize the importance of traditional cultural values and show pride in their heritage. Aspects such as family ties and enjoyment of Latin music are instances of continuing identification with their culture.

- Latins shop most often at large American (78%) and Cuban (74%) chain supermarkets. Cuban bodegas are also frequented by 49%.

- Latin families spend considerably more on groceries per family than do non-Latin families. Weekly food expenditures now average $102.22 for South Florida Latins and $80.67 for South Florida non-Latins.

- 38% of Latins redeem cents-off coupons when shopping. Coupons clipped from newspapers and those received in the mail are the preferred types.

- On average, Latins eat at non-fast food restaurants 2.16 times per month. Restaurants serving Cuban and Chinese food are the top favorites.

- In the area of beverages, in-home consumption of fruit nectars registers 50% higher among South Florida's Latin households compared to non-Latin households.

- Latins' purchase of frozen fried chicken for in-home consumption is higher than for non-Latins.

- Fresh milk and cream cheese also register higher levels of use among Latin households compared to non-Latin households.

- Fresh and/or frozen beef, poultry, sausage, seafood and pork are all consumed more often in Latin households than in non-Latin households.

- Latins, to a large degree, use more health and beauty aids than do non-Latins. Latin households are heavier users of -- among other products -- hair coloring products, hair styling mousse, hair spray and disposable razors.

- 86% of South Florida Latin households have at least one car, truck or van. This rate of ownership compares with 90% vehicle-owning households among non-Latins.

- Electronic devices are popular among South Florida Latins; the four most common being stereos, VCRs, sewing machines, and microwave ovens. Compact disc players can be found in 25% more Latin than non-Latin households.

- 71% of Latins belong to a video club compared to 55% of non-Latins.

- South Florida Latins are more inclined than non-Latins to attend live soccer matches as well as car races. The majority of Latins also enjoy watching pro baseball and pro football games on television.

- Latins in South Florida go to movie theatres quite frequently -- approximately once a month.

- 79% of Latins play the lottery.

- Approximately one-fifth of Latins as well as non-Latins used the emergency department and in-patient services of a local area hospital in the past year.

- Due to the availability of a high level of Latin culture in the Miami area and the near proximity of Latin countries, South Florida continues to attract new arrivals to the area. Recently, these new arrivals have been from Central and South America.

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This study was presented at the **1988 South Florida Hispanic Business Conference** on October 12, 1988. The conference, uniting Strategy Research Corporation's *South Florida Latin Market Seminar* and Hispanic Heritage Council's *The Hispanic Heritage Business Conference,* was attended by more than two hundred participants.

In addition to a presentation of study highlights, the conference featured a talk on Hispanic language and culture, a luncheon and two panel discussions of Hispanic marketing issues.

The morning panel discussion focused on issues of selecting effective media to reach the English and Spanish market in South Florida. The panel was moderated by **Gustavo Godoy** from KTVW-Channel 33, Phoenix. The distinguished panelists in this panel were:

Tito Gomez, Operations Manager, Corporate & External Affairs, Southern Bell
Ana Maria Fernandez Haar, President, IAC Advertising Group, Inc.
Betty Grudzinski, Marketing Research, The Miami Herald
Maria Llansa, Sales Manager, WQBA-AM/FM
Maria Elena Baradat, Partner, Fernandez Baradat/JGR & Associates
Cristina Schwarz, National Sales Manager, WLTV-Channel 23, Miami
Marcia Tonda, President, Tonda & Associates

The luncheon of the Conference was attended by approximately 1,200 representatives from local and national companies committed to Hispanic business in South Florida while Greater Miami Chamber of Commerce presented awards to top ten Hispanic Companies in Dade County.

The afternoon panel discussed issues on the important role of Hispanic business in South Florida on a local, national and international level. The panel was moderated by **Rick Sanchez**, a reporter from WSVN-Channel 7, Miami and **Ivan Cosimi**, Director of U.S. Department of Commerce, Miami District. The distinguished panelists in this panel were:

Rob de Cespedes, President, FKQ advertising International
Remedios Diaz Oliver, Executive Vice President, American International Container, Inc.
Leroy A. Johns, District manager, Sales, Eastman Kodak Company
Michael Lewis, Publisher, Miami Today
Jose Luis Muguiro Aznar, Export Director, Marques de Riscal
Julio Rumbaut, President, Rumbaut & Associates
Luis Santiago, National Manager, Hispanic Market, AT&T
Ana Soler, Vice President, Miami Mensual

At the end of the day, all participants were invited to a cocktail party sponsored by **Coca-Cola U.S.A.** and **De Armas Publications**.

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Strategy Research Corporation would like to thank every sponsor, speaker, panelist and participant for a successful conference.

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THE 1989 SAN DIEGO HISPANIC MARKET

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FOREWORD

This Study, *THE 1989 SAN DIEGO HISPANIC MARKET*, is the most recent in the series of Hispanic Market Studies conducted and published by Strategy Research Corporation over the past 18 years. It is the first Study dealing specifically with the San Diego area.

This series of studies conducted by Strategy Research Corporation presents current population data, market profile information, shopping pattern data, and product usage information to the marketing practitioners of the U.S. These data have been used by public and private sector demographers, planners and marketers to develop reliable and effective programs.

INTRODUCTION

THE CITY OF
SAN DIEGO
AMERICA'S FINEST CITY

MAUREEN O'CONNOR
MAYOR

GREETINGS

THE 1989 SAN DIEGO HISPANIC MARKET STUDY

As the Mayor of the City of San Diego, for and on behalf of the people of San Diego, it is my pleasure to extend greetings and best wishes to the sponsors and participants of "THE 1989 SAN DIEGO HISPANIC MARKET STUDY." San Diego is a City which strongly reflects the Hispanic heritage in its language, architecture and history.

The Market Study will provide an opportunity for all San Diegans to recognize the many and varied contributions Hispanics are making to San Diego. Hispanics perform important roles as leaders in Government, Business, Education, Science, Social Services, Arts, and the Humanities. Hispanic professionals, bilingual and bi-cultural, are ideal role models, and add countless success stories to San Diego's community.

San Diegans and, in particular, the Hispanic community join me in expressing appreciation to the sponsors of "THE 1989 SAN DIEGO HISPANIC MARKET STUDY" and to the Strategy Research Corporation for preparing the report. I am especially grateful to XEWT-CHANNEL 12, San Diego's only Spanish Language Television Station, for its generous help in the development of this study.

Sincerely,

Maureen

Maureen O'Connor
Mayor

CITY ADMINISTRATION BUILDING, 202 C STREET, SAN DIEGO, CALIFORNIA 92101 (619) 236-6330

PREFACE

12 XEWT

Jose Luis Guasch
DIRECTOR GENERAL

MAY 15, 1989.

DEAR FRIENDS :

ON BEHALF OF XEWT-CHANNEL 12,I AM BOTH PLEASED AND HONORED TO UNVEIL THE FIRST COMPREHENSIVE STUDY OF THE SAN DIEGO HISPANIC MARKET. XEWT IS PROUD TO BE A MAJOR SPONSOR OF A STUDY WHICH ADDRESSES THE GROUP WHICH FORMS A MORE THAN SIGNIFICANT PORTION OF SAN DIEGO'S POPULATION.

THE HISPANIC COMMUNITY PLAYS A PROMINENT ROLE IN BOTH THE SOCIAL AND ECONOMIC DEVELOPMENT OF SAN DIEGO. THE CONTRIBUTIONS OF THIS COMMUNITY CONTINUE TO GROW AT THE MOST SIGNIFICANT PACE AS HISPANIC PROGRESS TO POSITIONS OF INFLUENCE IN SAN DIEGO'S BUSINESS, SOCIAL AND ACADEMIC DOMAINS .

THIS STUDY WILL SERVE TO ENHANCE THE DEVELOPMENT AND PROSPERITY BROUGHT BY THE HISPANIC COMMUNITY AS WE USE THE ASSEMBLED INFORMATION FOR ENDEAVORS OF OUR OWN. WE HOPE THAT THE DATA WILL ALSO HEIGHTEN YOUR UNDERSTANDING OF OUR UNIQUE AND EVER-GROWING MARKET.

MANY THANKS TO ALL WHO SUPPORTED AND SPONSORED THIS FIRST IN-DEPTH STUDY OF THE HISPANIC MARKETPLACE IN SAN DIEGO.

VERY TRULY YOURS,

J. Guasch.

JOSE LUIS GUASCH
GENERAL MANAGER

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Queridos amigos:

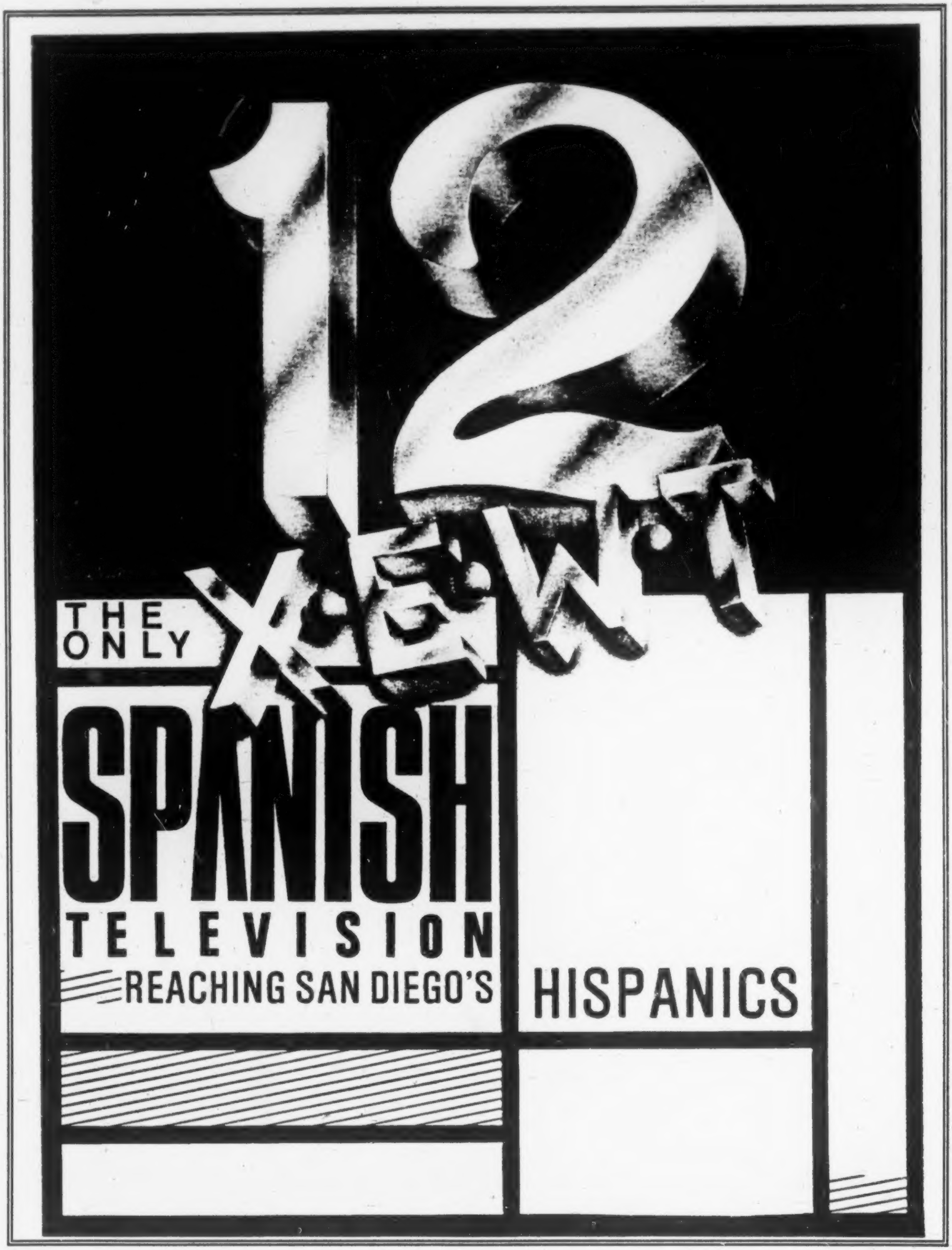
Tijuana es reconocida como un centro vital para el desarrollo comercial e industrial. La relación cultural y de mercado con la comunidad hispana de San Diego, ha permitido incrementar y reforzar los lazos de amistad y cooperación entre México y Estados Unidos.

Debemos reconocer la importancia que tiene la población hispana para el mercado de San Diego y Tijuana. Los esfuerzos realizados por la comunidad comercial de ambos lados de la frontera, han dado resultados que favorecen el desarrollo económico y social de nuestra población.

Este impacto económico se ve reflejado en el estudio de mercado San Diego-Tijuana. Es gratificante conocer mas a fondo la gran penetración del mercado hispano a través de esta publicación.

LIC. FEDERICO VALDES MARTINEZ

STRATEGY RESEARCH CORPORATION ACKNOWLEDGES AND THANKS THE FOLLOWING SPONSORS FOR THEIR COMMITMENT TO THE SAN DIEGO HISPANIC MARKET.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I. PURPOSE, SCOPE AND METHODOLOGY

A. PURPOSE OF THE STUDY

The San Diego ADI (Area of Dominant Influence), with an estimated 1989 Hispanic population of 473,800 persons, ranks 13th among the top 33 Hispanic ADIs. Approximately 2% of all Hispanics in the United States reside in the San Diego area.

The Hispanic community has become one of the fastest growing segments in the San Diego area. To illustrate, the Hispanic population has grown 43% since 1980. Hispanic population growth in the 80s, as projected, will exceed the growth of the 60s and 70s.

Because it is contiguous with Mexico and due to its close proximity to Tijuana, San Diego has been a point of entry into the U.S. for thousands of Hispanics, primarily from Mexico. More recently, San Diego has attracted Hispanics from Central and South America to its shores.

The objective of this Study is to provide up-to-date data on this large and growing market that offers marketers scope, opportunity and challenge. This objective has been addressed by considering and evaluating several key aspects of this market:

- Demographic Characteristics: How many Hispanics live in the San Diego ADI? What nationalities comprise the San Diego Hispanic market? How long have they lived in the area?
- Social Characteristics: A range of social/lifestyle behavior, including family size, work, education and language usage were explored.
- Purchase and Ownership Patterns: What are the priorities and habits of Hispanics in the San Diego area with regard to financial expenditure?

To achieve these objectives, Strategy Research Corporation conducted a Study utilizing as a basis the Survey Research Method. Employed was a carefully studied and comprehensive sample design. A detailed questionnaire which incorporated the areas and topics of concern was constructed and tested, and effective fieldwork controls throughout the data gathering phase of the Study were implemented.

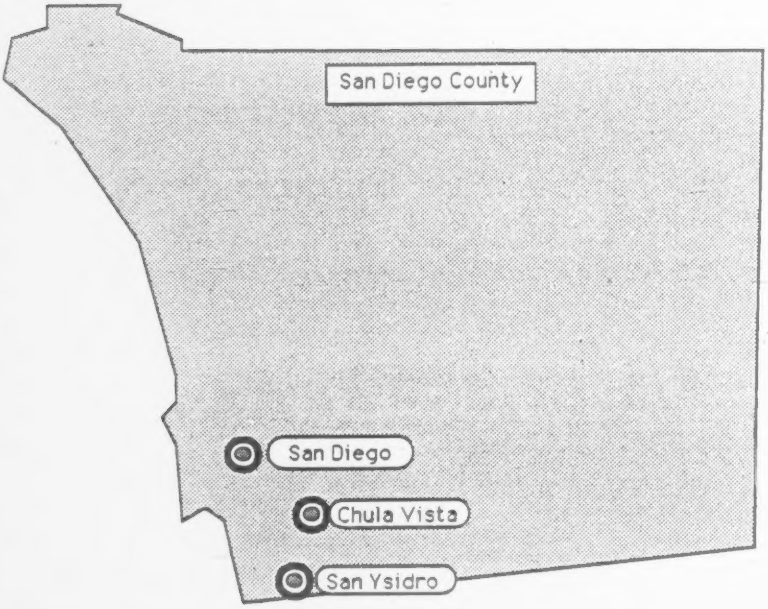
The results of this planning have yielded, in this *1989 San Diego Market Study*, a thoroughly detailed and up-to-date database for reaching this unique and dynamic sector.

B. SCOPE OF THE STUDY

The sample universe for this Study was based on over 99% of the population of the total San Diego Hispanic market. Interviews were conducted within San Diego county and distributed so as to include a representative profile of the Hispanics residing within the ADI.

The following map illustrates the San Diego market as it is referred to in this Study.

San Diego ADI


San Diego County
San Diego
Chula Vista
San Ysidro

C. METHODOLOGY

Strategy Research Corporation conducted both primary and secondary research in the gathering of information provided in this Report.

Secondary data sources are cited such as the publications of the U.S. Department of Commerce, Bureau of the Census, including both census findings and projections. State and Federal sources were also used, as well as material from Government sources dealing with Hispanics in the United States.

Population totals are drawn from U.S. Department of Commerce, Bureau of the Census published reports. Population forecasts utilized in this Study were made by Strategy Research Corporation.

With regard to the primary data presented in this Study, the methodology utilized was the Survey Research Method.

A total of 600 personal, in-home, face-to-face interviews were conducted with Hispanic heads of household. In addition, a total of 1,200 interviews were conducted at shopping malls among Hispanics who cross the border from Tijuana to do their shopping in the San Diego area.

The sampling method utilized a stratified, segmented, random probability sample of Hispanic households.

The sample was drawn by Strategy Research Corporation's professional sampling staff. A Clustering technique was used, procedural in samples for in-home interviews. The sampling cluster points were actual Census blocks as designated by the Bureau of the Census. Strategy Research Corporation maintains currently updated Census block, Census tract, and household data for survey and economic research purposes. A random probability sample was pulled, using a random starting point and a sequential interval of persons.

Once a random skip pattern was established, sampling points were assigned to their appropriate Census blocks. These statistics were transferred to Census block maps and then to street maps. For each block, one of six random house selection patterns was chosen randomly, and individual block maps were labeled with street names, starting pints, skip patterns, and rotation directions. Nine interviews were completed within each cluster, which consists of one sample block.

Interviews were conducted by trained, professional interviewers of Strategy Research Corporation, working under the direct supervision of Strategy Research Corporation staff Field Supervisors.

All interviewers were bilingual and of Hispanic origin. Interviewers were carefully trained in the use of the questionnaire and in the conduct of the interview.

A minimum of 20% of each interviewer's work was validated daily by staff Supervisors of Strategy Research Corporation. All questionnaires were then carefully edited, coded, and prepared for computer tabulation.

All programming and data processing was done in-house by Strategy Research Corporation personnel. Strategy Research Corporation operates a major in-house marketing research mainframe computer facility.

Interviewing for this Study was conducted in March, 1989.

Technical Note:

The definition of a Hispanic is a person who designates himself or herself to be of Latin (Hispanic) origin or ancestry. This is the same definition currently employed by the Bureau of the Census.

Strategy Research Corporation employs the best of industry practices and standards in its work and utilizes the best efforts to produce reliable studies. Nevertheless, no claim is made that the Study is free of all errors, and the Firm accepts no liability for the information or interpretation within this Report.

II. THE HISPANIC UNIVERSE

A. INTRODUCTION

San Diego, the second largest city in California, is the seat of San Diego County. Established as the oldest Spanish mission in California in 1769, San Diego, two hundred and twenty years later, is a booming sunbelt metropolitan area with a diverse economy based on international trade, tourism, fishing, agriculture, aerospace equipment industry and many Federal Government projects.

With its rich Spanish-Mexican heritage, San Diego is a rapidly growing Hispanic market. As of January 1989, the total Hispanic population in San Diego market area (San Diego County) is estimated at 473,800 persons, representing approximately 18% of the total population in the area. Due to its geographic proximity to Mexico's metropolis of Tijuana, the Hispanic population in San Diego will continue to increase. Because of San Diego's economic and social ties with Mexico, Hispanics in San Diego will continue to contribute to the diversity in culture, employement and opportunity in San Diego.

Virtually all Hispanics in the San Diego market area are of Mexican origin or descent. They live throughout San Diego County, with certain areas of concentration. San Ysidro, Bonita, Chula Vista, National City, La Mesa, El Cajon and South of the City have a higher Hispanic population density than other areas in the County.

This section of the Report discusses the history and development of San Diego's Hispanic market and cites the population growth of the area from 1970 to 1989. These data are then expressed in terms of household size and number of households in the Hispanic community.

The following subsection presents a short history of the Latin population in San Diego and recaps the historical evolution of Hispanic influence in San Diego.

B. SAN DIEGO HISPANIC HISTORY

The presence of Hispanics in the San Diego area may be dated back to the early part of the 16th Century when Hernando Cortez established a Spanish colony in Baja California. The first discovery of San Diego's great natural harbor (and in fact, of California), was made by Juan Rodriguez Cabrillo, a Portuguese navigator in the employ of Spain, in September, 1542. He named the Harbor, Bay San Miguel. But Juan Cabrillo is better known for another name he brought with him when he sailed into that harbor. Around the year 1510, a Spanish romantic fiction writer described an island "on the right-hand side of the Indies ... very near the Terrestrial Paradise ..." The author told of a race of beautiful women "without men among them." Their weapons were entirely of gold "for in all the island there is no other metal." The Queen of this island was called Calafia, and the writer named the mythical realm, California.

Years later, Spanish mariners cruising the waters northwest of Mexico, sighted the coast of what they fancied to be the golden realm. Word of the discovery spread and in 1542, when Juan Cabrillo sailed into San Diego Bay, the name California sailed with him.

Cabrillo and his men found little if any gold and less in the way of beautiful women. Centuries later though, the Spanish writer proved a prophet as California became famous for both.

In the latter part of the 16th Century, a Spanish explorer, Don Sebastian Vizcaino, mapped the same harbor Cabrillo had discovered and renamed it San Diego. The first settlement was not founded, however, until 1769, when Don Gaspar de Portola built a presidio, and Father Junipero Serra dedicated the Mission San Diego de Alcala, the first of a chain of 21 missions along California's coast. And San Diego became the first and oldest city of California.

In 1774, Mission San Diego de Alcala was moved five miles inland along the San Diego River to what is now Mission Valley. The original mission's location is now the site of Old Town in San Diego.

After the initial Spanish settlement, the City was slow to develop, mainly due to its geographically off-centered location with mountains to the east, the ocean to the west and Mexico's deserts to the south. The sea provided the only transportation, and the fresh water supply fluctuated greatly. However, the shipping trade between New England and California increased shortly after 1821, when Mexico won her independence from Spain. The cattle industry, providing meat, leather, and other products, also played an important role in early 19th Century San Diego's economy.

In 1822, the presidio and mission, like other Spanish holdings along the California coast, became part of the change-over when Mexico won its independence from Spain. In 1834 a Mexican pueblo, the area's first full-scale settlement, was built outside the walls of the presidio.

Whaling was a vital industry in San Diego from the 1850's through the 1870's. The population of the city in 1870 stood at 2,300, the county's population was 4,300. Unlike San Francisco or Los Angeles, the gold rush did not have any major impact on San Diego, mainly, due to its relatively remote geographic location.

However, in the 1880's, San Diego's population got its biggest jolt of growth when the California Southern Railroad was built. With the railroad companies' intensive recruitment of labor, the continuous flow of newcomers from Mexico had kept the Mexican communities in southern California alive and vibrant. With the establishment of the transcontinental railroads, the completion of sewage systems and telephone lines, San Diego's population was growing rapidly. By 1890, there were more than 16,000 persons in the city, and the numbers increased rapidly in the following decades. When the Mexican Revolution started in 1910, the city had 39,578 residents.

The Mexican Revolution of 1910 generated a large-scale Mexican immigration into the southwest region of the United States. Thousands of Mexicans fled the ravages of their country's civil war. Immigrants came from all levels of Mexican society: professional, skilled and unskilled. The majority though, were peasants. These immigrants, documented or undocumented, filled the labor shortages in mining, agriculture, and construction shortages that had persisted since the outbreak of the First World War.

Between 1910 and 1930, about one-tenth of Mexico's total population fled to the United States. Though most of these people originally settled in Texas and Arizona, eventually California's greater economic opportunities attracted more migration from the southwestern states. Many of these immigrants preferred to live in the towns where their jobs were. The proliferation of job opportunities in the cities prompted a greater concentration of Mexican population in the San Diego area. By the end of 1930, there were approximately 148,000.

The Great Depression brought not only poverty but also disillusion to the Mexicans of California. Mexicans, both immigrants and American-born, faced the harshness of arrest and deportation. This may have been the only period in U.S. history that the number of Mexicans emigrating from the U.S. was greater than the number immigrating to the U.S. Fighting against prejudice and discrimination, Mexican workers in southern California united with laborers from other Spanish-speaking countries, mainly Cubans and Puerto Ricans. The Depression changed the characteristics of the Mexican-Americans' presence in California. Strikes and riots became channels of outcries for more social and political involvement in American society.

The Second World War manifested the Mexican-Americans' determination to be part of the American mainstream. Returning from the War, Mexican-American soldiers, many of whom had acquired new job skills, expanded their employment opportunities and improved the economic potential of their communities. With training in craftsmanship and professional programs, the Mexican-Americans' upward occupational and social mobility began to be attainable after the War. By the end of 1950's, approximately 62% of California's Mexican-Americans in California were engaged in professional, technical, skilled and semi-skilled jobs, compared with 40% in the 1930's. Between 1950 and 1960, the number of Hispanic residents in California almost doubled, increasing from 758,400 to 1,426,538, according to the Bureau of the Census.

The burgeoning economy of California and the widening gap in consumption and per capita income between Mexico and the U.S. have encouraged more Mexicans to cross the border to expand their economic opportunity. Since the 1970's, Mexican immigration to the U.S. has become a mass phenomenon. San Diego, with its geographic proximity and job opportunities, has absorbed the immigration influx along with other southern California cities.

Adjacent to the U.S.-Mexican border, San Diego, becomes the first stop for many Mexican immigrants. The continuous wave of new immigrants has kept the area's Mexican tradition alive. Spanish is still spoken in San Diego, and Hispanic culture is highly visible in clubs, festivals, and restaurants, as well as in shops and on the street.

San Diego, known in the past for its naval bases, its prominent role in early aviation development, and its proximity to Mexico, has prospered upon a diverse commercial foundation that has included industry, agriculture, research, trade, tourism, and the City's great appeal as a quality place to live.

Today, there are nearly 473,800 Hispanics living in the San Diego Market Area, representing 17.7% of its total population. They are an integral part of the urban, suburban and rural life, acculturated enough to participate in the growth of San Diego, but conscious enough of themselves as a group to maintain their own identity and heritage..

C. POPULATION CHANGE IN THE SAN DIEGO AREA: 1970-1989

Strategy Research Corporation estimates that the total population of the San Diego Market Area (ADI) is presently at approximately 2,670,900. This figure represents a 43.4% increase over the area's 1980 population of 1,861,846 or an average annual rate of growth of almost 5%.

During the previous decade, the area had grown at an even faster pace, increasing by a rate of 55.4% or about 5.5% annually. The area's population increased from 1,198,323 in 1970 to 1,861,846 in 1980. The growth rate during the nineteen years between 1970 and 1989 amount better than 147%, or an annual average of 7.7% per year. The following table shows these trends.

POPULATION GROWTH
SAN DIEGO MARKET AREA
1970 - 1989

Year	Population	Change
1970	1,198,323	--
1980	1,861,846	55.4%
1989	2,670,900	43.4

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

D. HISPANIC AND NON-HISPANIC POPULATION COMPOSITION

In 1970, the San Diego market's population stood at close to 1.2 million. Of this total, 1.1 million or 89.9% was comprised of non-Hispanic persons. The remaining 10.1% (121,485) were comprised of Hispanics. By 1980, when the Hispanic population had more than doubled over the 1970 total, it represented close to 15% of the area's total population. By 1989, the Hispanic population share of market in San Diego had increased to 17.7% of the total and every indication points toward a continuation of this growth trend.

HISPANIC AND NON-HISPANIC POPULATION
SAN DIEGO MARKET AREA
1970 - 1989

	Hispanic		Non-Hispanic		Total	
Year	Number	Percent	Number	Percent	Number	Percent
1970	121,485	10.1%	1,076,838	89.9%	1,198,323	100.0%
1980	275,177	14.8	1,586,669	85.2	1,861,846	100.0
1989	473,800	17.7	2,197,100	82.3	2,670,900	100.0

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

E. HISPANIC POPULATION GROWTH IN THE SAN DIEGO AREA: 1970-1989

The number of persons of Hispanic origin or descent residing in the San Diego Market Area is currently estimated at 473,800. In 1980, the U.S. Bureau of the Census counted 275,692 Hispanic residents in the San Diego Market Area. Thus, during the first nine years of the decade, there was an increase of close to 200,000 Hispanic residents in this market.

The 200,000 person increase recorded by the Hispanic segment of the market represented almost one third (32.5%) of this total change. Interestingly, this was a slightly higher share of total growth than occured during the previous decade. During the 1970's, the Census Bureau recorded an increase in the San Diego market of approximately 154,000 persons which represented 30.1% of the total increase of 663,523.

The Hispanic population of the San Diego market increased by 72.2% between 1980 and 1989. At the same time, the area's non-Hispanic population grew by approximately 610,400 persons or by 38.5% during the nine years. The area's total population (Hispanic and non-Hispanic) grew by 43.4%. Thus, the growth rate of the Hispanic population has been nearly double that of the non-Hispanic population and about one-third greater than that of the total population.

HISPANIC VS. NON-HISPANIC
POPULATION GROWTH IN SAN DIEGO ADI
1970 - 1989

	1970	1980	Net Change 1970-1980	% Change 1970-1980	1989	Net Change 1980-1989	% Change 1980-1989
Non-Hispanic	1,076,838	1,586,669	509,831	47.3%	2,197,100	610,431	38.5%
Hispanic	121,485	275,177	153,692	126.5%	473,800	198,623	72.2%
Total	1,198,323	1,861,846	663,523	55.4%	2,670,900	809,054	43.4%

Source: U.S. Department of Commerce
Bureau of the Census
Strategy Research Corporation

F. NUMBER OF HOUSEHOLDS

The San Diego ADI, which currently has nearly one million households (969,588). Approximately one hundred and twenty thousand (119,800) Hispanic households exist in this ADI, which amounts to 12.4% of the total households found in the area.

HOUSEHOLDS IN SAN DIEGO ADI
1989

Ethnicity	Households	Percent of Total
Hispanic	119,800	12.4%
Non-Hispanic	849,788	87.6
TOTAL	969,588	100.0%

Source: Strategy Research Corporation

As mentioned earlier, the total Hispanic population represents nearly 17.7% of the total San Diego population, and slightly more than 12% of the total number of households. The difference between these two percentages can be attributed to the difference in the household size of Hispanics versus non-Hispanics. The number of persons per Hispanic household is 3.95 in San Diego. The average number of persons per non-Hispanic household is 2.59.

COMPARISON OF HISPANIC/NON-HISPANIC POPULATION
AND HOUSEHOLDS IN SAN DIEGO ADI
1989

	Population		Households		Persons Per Household
	Size	Percent	Size	Percent	
Hispanic	473,800	17.7%	119,800	12.4%	3.95
Non-Hispanic	2,197,100	82.3	849,788	87.6	2.59
TOTAL	2,670,900	100.0%	969,588	100.0%	2.75

Source: Strategy Research Corporation

III. MARKET PROFILE AND CHARACTERISTICS

An estimated 473,800 Hispanics currently reside in the San Diego ADI. What are the demographic characteristics of these Hispanics? Where do they come from? Are they young or old? How long have they lived in the United States? Were they born in another country or are they native-born? What are their educational levels? What type of occupation do they hold? What is their yearly income? What is their buying power?

This section of the report will provide an in-depth look at the demographic profile of the Hispanic community in the San Diego ADI.

A. COUNTRY OF ORIGIN -- HEAD OF HOUSEHOLD

1. Country Of Origin

Hispanics of Mexican origin or descent have historically been the dominant sub-segment among San Diego's Hispanics. In 1989, a total of 96.1% of the Hispanic heads of household are of Mexican origin or descent.

Households headed by persons from Central America represent the second largest percentage of San Diego Hispanics (1.7%), which is comprised of persons from Guatemala, Costa Rica, El Salvador and Nicaragua.

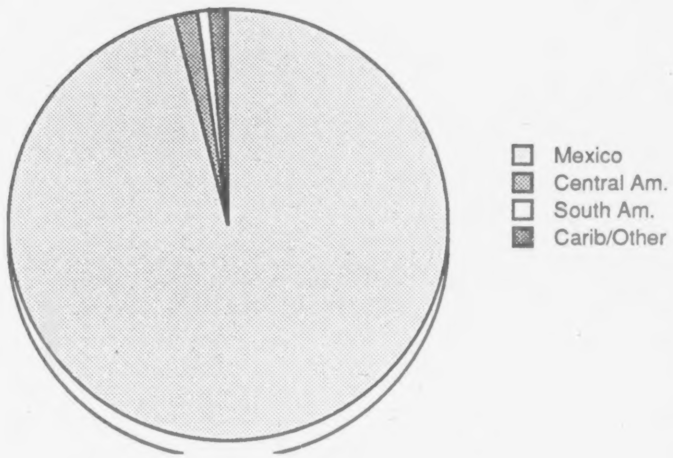
COUNTRY OF ORIGIN
HISPANIC HEAD OF HOUSEHOLD

	Percent
Mexico	96.1%
Central America	1.7
Caribbean And Other	1.5
South America	0.7
TOTAL	100.0%

Source: Strategy Research Corporation

Hispanics from the Caribbean and other nations comprise 1.5% of the Hispanics in San Diego. Heads of household of South American origin or descent represent 0.7% of the San Diego Hispanic population base.

COUNTRY OF ORIGIN
HEAD OF HOUSEHOLD



Source: Strategy Research Corporation

2. Number Of Persons By Country Of Origin

Of the estimated 1989 San Diego Hispanic population of 473,800 persons, approximately 455,322 are from Mexico or of Mexican ancestry.

Central Americans enumerate 8,055 of San Diego's Hispanic population. A total of 3,316 persons reside in a households where the head of household is of South American origin or descent.

NUMBER OF PERSONS BY COUNTRY OF ORIGIN OF HISPANIC HEAD OF HOUSEHOLD SAN DIEGO ADI

Head Of Household Country Of Origin	Number Of Persons
Mexico	455,322
Central America	8,055
Caribbean And Other	7,107
South America	3,316
TOTAL	473,800

Source: Strategy Research Corporation

Hispanics from the Caribbean and other Hispanic countries number slightly more than 7,000. This group is primarily comprised of Spaniards and Puerto Ricans.

B. RESIDENCY STATUS

This section reveals several factors regarding San Diego Hispanics' residency status, both in the United States as well as in the San Diego area. Strategy Research Corporation queried Hispanics with regard to their country of birth, and the length of time the head of household has been living in the United States as well as in the San Diego area.

1. Place Of Birth

Hispanic heads of household in the San Diego area were asked if they were born in the United States or another country. One-fifth (20.5%) of San Diego's Hispanics were born in the United States, while more than three-fourths (79.5%) were born in another country, most notably Mexico.

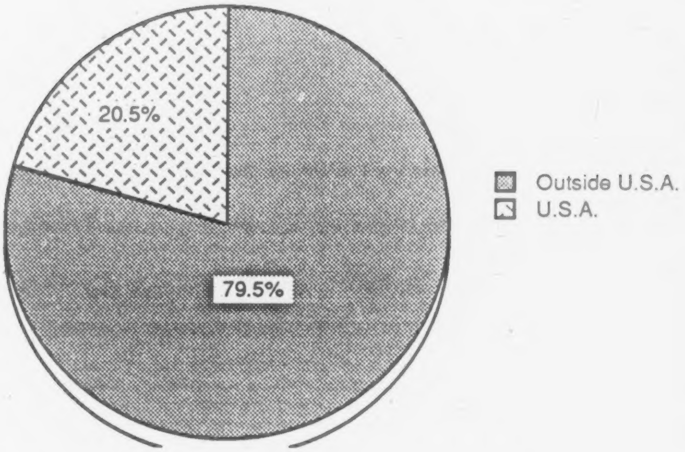
PLACE OF BIRTH

	Percent
Other Country	79.5%
U.S.A.	20.5
TOTAL	100.0%

Source: Strategy Research Corporation

The political and economic situations south of the U.S./Mexico border have resulted in the immigration of thousands of Spanish-speaking people. Specifically, the economic instability in Mexico and the political unrest in Central America have been major catalysts in increasing the number of recent arrivals in the San Diego area. Why do these Hispanics come to the U.S.? Primarily because they look to the U.S. as the "Land of Opportunity," offering them and their families a better life in terms of civil rights and financial improvement.

PLACE OF BIRTH AMONG HISPANICS



Source: Strategy Research Corporation

2. Length Of Residence In The United States

Hispanic heads of household in the San Diego ADI were asked to state the length of time they had been living in the United States.

Because California is contiguous with Mexico, many Hispanics enter the States through San Diego, their "point of entry", and start their new life. The number of Hispanics who have entered the United States is impressive. But this number does not measure the potential for future immigration to the U.S. from Latin America (Mexico, Central and South America).

A total of 132,190 Hispanics (27.9%) in San Diego have arrived in the United States within the past eight years.

LENGTH OF RESIDENCE
IN THE UNITED STATES
AMONG HISPANIC HEADS OF HOUSEHOLD

	Percent
Less Than 1 Year	2.1%
1-2 Years	3.1
3-4 Years	12.1
5-6 Years	2.7
7-8 Years	7.9
9-10 Years	9.6
11-15 Years	12.4
16-20 Years	12.1
21-25 Years	9.6
Over 25 Years	28.4
TOTAL	100.0%
Average Length Of Residence In U.S.A.	15 Years, 3 Months

Source: Strategy Research Corporation

A total of 28.4% of the Hispanics in San Diego have been living in the United States for over 25 years, with an additional 21.7% indicating residence from 16 to 25 years.

The average length of residence in the United States among San Diego Hispanics is 15 years, 3 months.

3. Length Of Residence In The San Diego Area

In addition to being queried with regard to their length of residence in the United States, San Diego Hispanics were asked to state how long the head of household had been living in the San Diego area.

A total of 191,889 of the Hispanic population in San Diego (40.5%) has been residing in the area for eight years or less. This indicates that the market has acquired 60,173 new Hispanic residents within that time frame.

LENGTH OF RESIDENCE
IN SAN DIEGO
AMONG HISPANIC HEADS OF HOUSEHOLD

	Percent	
Less Than 1 Year	4.1%	40.5%
1-2 Years	10.3	
3-4 Years	12.7	
5-6 Years	6.5	
7-8 Years	6.9	
9-10 Years	10.7	
11-15 Years	15.5	
16-20 Years	11.7	
21-25 Years	6.5	
Over 25 Years	15.1	
TOTAL	100.0%	
Average Length Of Residence In San Diego	11 Years, 9 Months	

Source: Strategy Research Corporation

Slightly over one-third (37.9%) of the Hispanic heads of household have been residents of San Diego for 9 to 20 years, with an additional 21.6% indicating residence of 21 or more years.

The average length of residence in the San Diego area among Hispanic heads of household is 11 years, 9 months.

C. HOUSEHOLD SIZE

The following statistics on the number of persons per household affirm a dynamic Hispanic presence. The average number of persons per Hispanic household in the San Diego area is currently estimated at 3.9 persons, which is a relatively large household size. To illustrate, the average household size for all U.S. Hispanics is 3.6 (*1989 U.S. Hispanic Market Study*, Strategy Research Corporation).

NUMBER OF PERSONS
PER HISPANIC HOUSEHOLD

	Percent
One	5.1%
Two	10.2
Three	26.6
Four	24.5
Five	17.0
Six	10.2
Seven	4.1
Eight Or More	2.3
TOTAL	100.0%
Average Number Of Persons Per Household	3.9

Approximately 15.3% of the Hispanic households in the San Diego area consist of one or two persons. One-fourth (26.6%) are three-member households and 24.5% are four-person households.

Households with five members constitute 17.0% of the Hispanic households in the San Diego area while six-member households comprise 16.6% of the San Diego Hispanic household base.

D. AGE/SEX DISTRIBUTION

This is a relatively young market -- approximately 38.4% of the San Diego Hispanic market is under 18 years of age, while 34.0% are between the ages of 18 and 34.

SAN DIEGO ADI
HISPANIC AGE/SEX DISTRIBUTION

	Hispanic Population (000)		Percent Distribution	
Males 18-24	37.4		7.9%	
Males 25-34	52.3		11.0	
Males 35-49	36.9		7.8	
Males 50-54	5.6		1.2	
Males 55-64	11.3		2.4	
Males 65+	8.6		1.8	
Males 18+		**152.1**		**32.1%**
Females 18-24	28.7		6.1	
Females 25-34	42.6		9.0	
Females 35-49	39.4		8.3	
Females 50-54	6.4		1.3	
Females 55-64	12.7		2.7	
Females 65+	9.9		2.1	
Females 18+		**139.7**		**29.5**
Teens (12-17)	**59.7**	**59.7**	**12.6**	**12.6**
Children (0-11)		**122.3**		**25.8**
Children (2-11)	101.9		21.5	
TOTAL 2+	453.4		95.7%	
TOTAL		**473.8**		**100.0%**

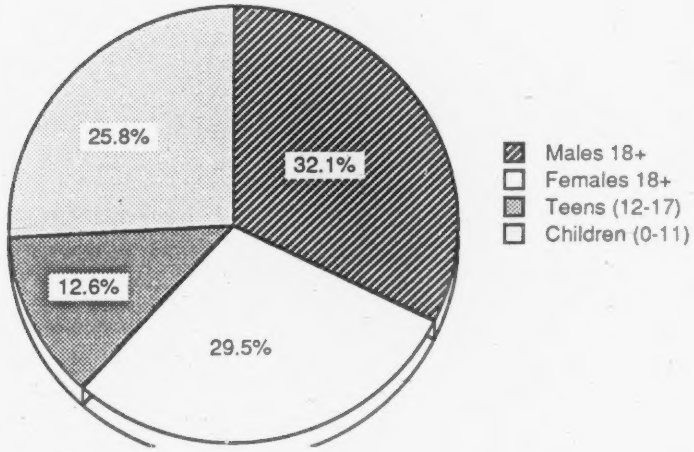
Average Age: 24.4 Years

Source: Strategy Research Corporation

Adult males 18+ comprise 32.1% of the Hispanic population base, while females make up 29.5% of San Diego's Hispanic population.

The average age of the San Diego Hispanic market is 24.4 years, which is younger than the average age for the U.S. Hispanic population as a whole -- 25.7 years (*1989 U.S. Hispanic Market Study*, Strategy Research Corporation).

SAN DIEGO
HISPANIC AGE/SEX DISTRIBUTION



Source: Strategy Research Corporation

E. OCCUPATION -- HEAD OF HOUSEHOLD

All survey participants were asked to state the occupation of the head of their household.

Almost one-third of the Hispanic heads of household in San Diego (32.1%) are currently employed in white collar jobs as professionals, managers, owners, or in technical, clerical or sales positions. This is quite an impressive figure. To illustrate, a total of 21.5% of all U.S. Hispanics hold white collar positions (*1989 U.S. Hispanic Market Study*, Strategy Research Corporation).

OCCUPATION
HEAD OF HOUSEHOLD

Occupation	Percent
White Collar	
Professional/Manager/ Owner/Technical/ Clerical/Sales	32.1%
Blue Collar	
Craftsmen/Operatives/ Service Workers/ Laborers/Farmers	51.1
Other	
Retired/Students/Military/ Disabled	8.9
Unemployed	5.9
Housewife	2.0
TOTAL	100.0%

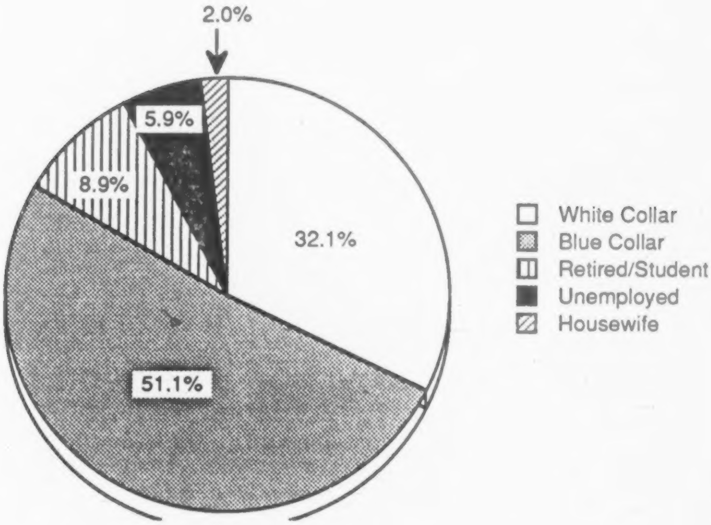
Source: Strategy Research Corporation

Approximately one-half (51.1%) of Hispanic heads of household are employed in blue collar jobs as craftsmen, operatives, service workers, laborers or farmers.

A total of 8.9% of San Diego Hispanic heads of household are retired/students/disabled or in the military.

The number of unemployed heads of household registers at 5.9%. This is a relatively low number when compared to other Hispanic markets (6.9% San Antonio, 9.8% Phoenix/Tucson).

OCCUPATION
HEAD OF HOUSEHOLD



Source: Strategy Research Corporation

F. EMPLOYMENT

All survey respondents were asked to state how many of their household members were employed full-time.

There are a total of 119,800 Hispanic households in San Diego. A total of 90.1%, or 107,940, of these households have family members who are employed full-time and/or part-time.

Full-time employment among Hispanic households in San Diego registers at 88.2%, while 18% of the Hispanic households have at least one member who works part-time.

EMPLOYMENT
AMONG HISPANICS

	Percent	Number Of Households	Number Of Persons
Full-Time	88.2%	105,664	191,680
Part Time	18.0	21,564	23,960
TOTAL	90.1%	107,940*	215,640
Average Number Of Persons Employed Per Household	1.8		

* Multiple Response: Some households have indicated both full-time and part-time employment among its members.

Source: Strategy Research Corporation

Currently, there are an average of 1.8 working persons in San Diego Hispanic households. Numerically, this indicates that a total of 215,640 Hispanics in San Diego are employed; 191,680 work full-time and 23,960 are part-time employees.

G. LEVEL OF EDUCATION -- HEAD OF HOUSEHOLD

All Hispanic heads of household were asked to state the last level of education they had personally completed.

San Diego is home to several universities and colleges, namely San Diego State University, University of California at San Diego, San Diego City College, La Jolla University, and United States International University, to name a few. Thus, it is not surprising that 11.9% of the Hispanic heads of household interviewed were college graduates or had some college education. More Hispanic heads of household in San Diego are college educated than their counterparts in Los Angeles (7.3%) and Phoenix/Tucson (9.4%).

These educational attainment figures for San Diego Hispanics are quite impressive compared to U.S. Hispanics as a whole. On average,9.0% of all U.S. Hispanic adults have some college education or are college graduates (*1989 U.S. Hispanic Market*, Strategy Research Corporation).

LEVEL OF EDUCATION
HEAD OF HOUSEHOLD

	Percent
Elementary/Junior High School	56.3%
High School/ Bachillerato[1]	26.3
Technical School	2.1
College	11.9
No Schooling	3.4
TOTAL	100.0%

Source: Strategy Research Corporation

More than one-half (56.3%) of the Hispanic heads of household in San Diego obtained an elementary or junior high school education. In Mexico it is mandatory, under governmental decree, for residents to obtain a sixth grade education, *primaria*, in order to have gainful employment. Slightly over one-fourth (26.3%) attained a high school or *bachillerato*[1] education.

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[1] A *bachillerato* differs from traditional domestic education in that it is a 5-year program.

H. HOUSEHOLD INCOME

Based on the results of our interview survey, it is clear that Hispanic residents and households contribute most significantly to the economy of the San Diego market.

The average annual income among San Diego households in 1989 is $27,457.

MEAN AVERAGE
HOUSEHOLD INCOME
1989

Mean Average Annual Income	$27,457

Source: Strategy Research Corporation

Components of this income include earnings from wages, tips and self-employment, interest and divident payments, alimony and child support payments, Social Security, public assistance, and other sources.

The next sub-section illustrates how this average household income figure translates into an impressive level of spending power.

I. HISPANIC BUYING POWER

As previously noted in this report, the San Diego Market Area currently comprises approximately 119,800 households that are headed by Hispanics. Applying the average household income of $27,457 to this total results in an aggregate gross income of approximately $3.3 billion.

According to data developed by the firm, Market Statistics, Inc., and published in the *Annual Survey of Buying Power*, the total spendable dollars generated by Hispanic Households in San Diego is currently approximately $2.8 billion, or approximately 85% of total gross income.

HISPANIC BUYING POWER
1989

San Diego Market Area (ADI)	$2.8 billion

Source: Strategy Research Corporation

With the continuing influx of Hispanics into the San Diego area, the purchasing power of Hispanics as a group will increase. In addition, San Diego Hispanics are, by and large, young people. Per capita earnings will thus tend to increase on a year-to-year basis, further reinforcing the buying power of the area's Hispanic community.

The next subsection presents data regarding San Diego Hispanics' Spanish and English language usage as well as their level of proficiency for each.

IV. LANGUAGE PATTERNS

Language usage represents a key determinant in the acculturation and, ultimately, the assimilation of arrivals to a new country. It is also inextricably woven into one's culture and traditions.

In order to provide meaningful insight into the patterns of language usage among Hispanics in San Diego, all survey participants were asked a series of questions regarding:

- The First Language They Learned To Speak
- Their Ability To Speak/Read/Write Spanish And English
- Which Language They Speak Most Frequently At Home/Work/On Social Occasions

In order to determine if the San Diego Hispanic market is responsive toward the need for language skills, respondents were also asked the degree of importance they place on their children's ability to read and write both Spanish and English with proficiency.

A. FIRST LANGUAGE SPOKEN

All Hispanic respondents were asked which language they first learned to speak. The first language spoken is usually preserved throughout one's lifetime and it often represents a cultural bond with that person's heritage. This is especially important after they are exposed to a new language or culture as many Hispanic immigrants living in the United States have experienced.

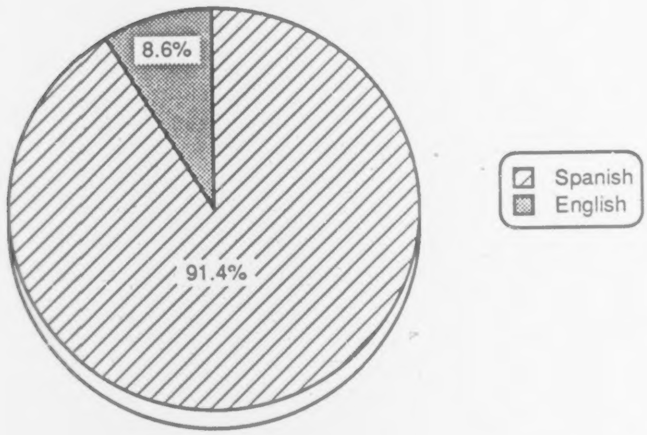
LANGUAGE FIRST LEARNED TO SPEAK

	Percent
Spanish	91.4%
English	8.6
TOTAL	100.0%

Source: Strategy Research Corporation

Nine out of ten Hispanics presently residing in San Diego (91.4%) first learned to speak the Spanish language.

FIRST LANGUAGE LEARNED TO SPEAK



Source: Strategy Research Corporation

B. SPEAKING ABILITY -- SPANISH/ENGLISH

Learning to speak a foreign language can be one of the most difficult endeavors a person might undertake. Especially when the new language has very little in common with one's native tongue. Because of the many colloquialisms and adages present in the English language and its grammar, it is a relatively difficult language for a Hispanic to learn (more difficult, for example, than the Romance languages).

How well do San Diego Hispanics speak Spanish? How well do they speak English, if at all? In order to measure the fluency with which Hispanics in San Diego speak English and Spanish, all survey respondents were asked to rate their speaking ability.

Selection from a 6-point rating scale, which included the options very well, well, fair, poor, very poor, can't speak, yielded the following results.

Approximately eight out of every ten Hispanics in San Diego can speak Spanish very well or well. In direct contrast, only 1.7% stated that they speak the language poor/very poor or not at all.

ABILITY TO SPEAK SPANISH/ENGLISH

	Spanish	English
Very Well/Well	79.2%	36.9%
Fair	19.1	38.3
Poor/Very Poor	1.4	15.2
Can't Speak	0.3	9.6
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

With regard to the English language, just over one-third of the Hispanics (36.9%) rated their English language speaking ability as very well/well, while nearly one-fourth (24.8%) speak the language poor/very poor or not at all.

C. READING ABILITY -- SPANISH/ENGLISH

Traditionally speaking, when one learns a foreign language (in school) one is first taught how to speak the language; then you are taught how to read in that new language, and finally how to write it.

The same is true for persons who emigrate to the United States. Their first priority is probably to find employment and housing. Language fluency is acquired first by hearing it (in the work place, on the streets, etc.). Once a person starts understanding the meaning of the words, he/she will attempt to reiterate those phrases. Learning how to read and write the language happens soon thereafter and requires a little more effort and guidance than speaking. Thus, it is not surprising that a person's speaking proficiency might be a little higher than his/her reading or writing ability.

Once again, survey respondents were asked to rate, using the same 6-point scale, their reading ability of both Spanish as well as English.

ABILITY TO READ SPANISH/ENGLISH

	Spanish	English
Very Well/Well	78.4%	41.1%
Fair	14.4	26.2
Poor/Very Poor	5.9	16.2
Can't Read	1.3	16.5
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Nearly eight out of every ten Hispanics in San Diego (78.4%) can read Spanish very well/well, compared to only 41.1% who have the same level of ability to read English.

Only 1.3% of the Hispanics interviewed cannot read Spanish at all, compared to 16.5% who cannot read the English language.

D. WRITING ABILITY -- SPANISH/ENGLISH

The proficiency of writing Spanish and English was measured in the same manner as the ability to speak and read these languages. Namely, Hispanics were asked to rate their Spanish and English writing abilities by using a 6-point scale (very well, well, fair, poor, very poor, can't write).

Three-fourths of the Hispanics in San Diego are able to write Spanish very well or well. In contrast, only half as many Hispanics (36.5%) can write English with the same level of proficiency.

ABILITY TO WRITE SPANISH/ENGLISH

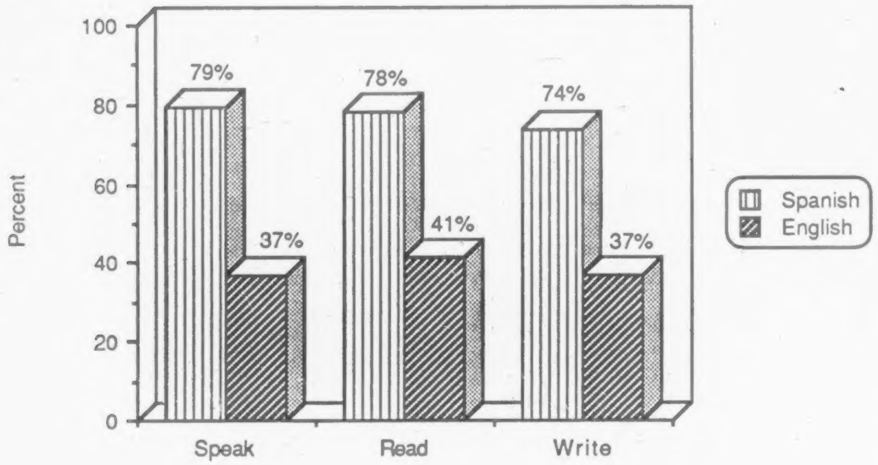
	Spanish	English
Very Well/Well	73.5%	36.5%
Fair	18.3	27.8
Poor/Very Poor	6.4	17.8
Can't Write	1.8	17.9
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

A total of 18.3% of survey respondents rated their Spanish writing ability as fair, while one-fourth (27.8%) can fairly write English.

Eight percent (8.2%) of the Hispanics in San Diego cannot write in the Spanish language; 17.9% cannot write in English.

LANGUAGE ABILITY BY "VERY WELL/WELL" RESPONSES



Source: Strategy Research Corporation

E. LANGUAGE SPOKEN AT HOME/AT WORK/ON SOCIAL OCCASIONS

What language do Hispanics in San Diego speak various times? Does their environment dictate or influence what language they will speak? What do they speak at work? Which language do they speak at home with other family members? Do they speak Spanish or English most often when they find themselves in social gatherings?

The following is a summary of the language spoken most frequently by Hispanics in the San Diego area at various times.

Spanish is spoken most frequently by San Diego Hispanics at home (61.6%) and on social occasions (60.5%). This indicates that they are culturally affixed to their heritage through language. It is the link that bonds them to their homeland and traditions.

LANGUAGE SPOKEN MOST FREQUENTLY
BY SAN DIEGO HISPANICS
AT VARIOUS TIMES

Language Spoken	At Home	At Work	On Social Occasions
Spanish	61.6%	30.1%	60.5%
English	16.7	35.9	11.6
Both	21.7	34.0	27.9
TOTAL	100.0%	100.0%	100.0%

Source: Strategy Research Corporation

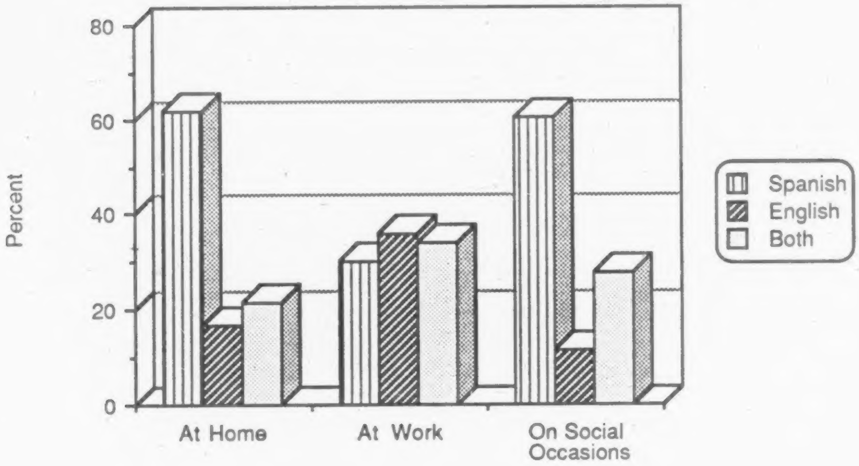
Spanish is spoken most frequently in the work environment by almost one-third of the Hispanics who work (30.1%). The English language is also used extensively in the work place, with 35.9% of Hispanic workers using English most frequently during their daily routine.

Whereas 61.6% of Hispanics speak Spanish most frequently in the home, another 21.7% speak both Spanish and English. Thus, the combined total of Spanish language usage in the home among Hispanics in San Diego is 83.3%.

Even though the average length of residency of the San Diego Hispanic community is close to 12 years, the language spoken most frequently in the home is still Spanish. As stated earlier in this report, there are approximately 119,800 Hispanic households in the San Diego ADI. Thus, Spanish is the language spoken most frequently in approximately 73,797 homes. When the additional 21.7% who speak both Spanish and English are added, the combined total is approximately 88,793 households.

These language patterns indicate that although the Hispanics in San Diego lead a partially assimilated lifestyle outside their homes, a natural phenomenon called cultural renewal occurs when they are in a more relaxed environment such as when they are at home with their families or at social gatherings with their friends.

LANGUAGE SPOKEN MOST FREQUENTLY AT VARIOUS TIMES



Source: Strategy Research Corporation

F. ATTITUDES REGARDING LANGUAGE

In order to determine if the San Diego Hispanic market is responsive toward the need for bilingual language ability, all survey respondents were asked the following questions:

> "How important is it to you that your children have the ability to read and write Spanish perfectly?"
>
> "How important is it to you that your children have the ability to read and write English perfectly?"

The possible options were:

- Very Important
- Somewhat Important
- Neither Important Nor Unimportant
- Not Very Important
- Not At All Important

In interpreting the following data, it appears that the San Diego Hispanic market is very pragmatic about the need for language skills. Both English and Spanish are needed to maximize economic and social opportunities. The market senses that both languages are equally important for these reasons.

Nine out of every ten Hispanics in San Diego (97.9%) feel that it is very/somewhat important for their children to have the ability of reading and writing Spanish with perfection. San Diego Hispanics place a great deal of importance on their children mastering English language skills. Virtually all survey respondents (98.0%) think it is very important for their children to read and write English perfectly.

IMPORTANCE OF CHILDREN
READING AND WRITING
SPANISH AND ENGLISH PERFECTLY

	Spanish	English
Very Important	94.1%	98.0%
Somewhat Important	3.8	1.9
Neither Important Nor Unimportant	1.5	0.1
Not Very Important	0.1	0.0
Not At All Important	0.5	0.0
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Only 0.6% of the Hispanics interviewed felt that their children being able to read and write Spanish perfectly is not very important or not at all important.

The next section provides an in-depth look at how Hispanics in San Diego feel about specific social attitudes.

V. SOCIAL ATTITUDES

This section of the report presents data which reflects the importance of certain cultural values to the Hispanics in San Diego. How much importance do they place on the preservation of their culture and traditions? Do they prefer to listen to Latin music or American music? Do they like to watch Spanish-language television?

Survey respondents were presented with a series of attitudinal statements and asked to state the extent of their agreement with each statement using the following 5-point scale:

- Completely Agree
- Somewhat Agree
- Neither Agree Nor Disagree
- Somewhat Disagree
- Completely Disagree

Hispanics in San Diego present an impressive image with regard to their family and culture. In this regard, traditions have played a major role in shaping the area's present-day Hispanic community.

The San Diego Hispanic community is **very proud** of its background and believes in the preservation of its heritage. Nine out of ten Hispanics completely/somewhat agree with the statements "I like to listen to Latin music" (92.2%) and "I am proud to be Hispanic and I think our culture/traditions should be preserved and kept" (91.0%). Music and traditions are integral components of any culture and something that its people can identify with. To Hispanics, music is a part of their everyday life. For the most part, Hispanics don't just listen to music, they live it. More importantly music provides a link to their respective ethnic background, allowing them to transcend their immediate surroundings and bond themselves with their heritage. Music and language are the universal elements among all Hispanic sub-groups, uniting the nationalities that make up the Pan American continent. Although certain traditions and customs are colloquial, overall Hispanics share specific values and mores that are exclusive to them.

Eight out of ten Hispanics completely/somewhat agreed with the statement "I like to watch Spanish television" (83.9%). This high level of Spanish television viewership is, like language usage, a reflection of their cultural renewal. Like the language usage patterns presented in the previous section, Hispanics in San Diego prefer to communicate, whether visually or verbally, in their own language while at home.

Hispanics in San Diego indicated a relatively high level of brand loyalty, as 81.9% completely/somewhat agreed with the statement: "The popular name brands I use most often today are going to be the same brands I will be using next year." Historically, Hispanics develop a level of brand loyalty that is passed on through the generations. For the most part, brand awareness is first learned in the home and absorbed into their own lifestyle patterns. Naturally when Hispanics emigrate to another country like the United States, they bring that brand loyalty which was established in their country of origin and continue to use the same brands in their new homes.

Hispanics as a whole like to feel welcome by product manufacturers. Hispanics react positively when companies make an effort to recognize the Hispanic community, either by sponsoring Hispanic festivals, advertising in the Spanish language, etc. The San Diego Hispanic market is no exception: 80.7% of the respondents interviewed completely or somewhat agreed with the statement "I prefer to buy products from companies that recognize the Hispanic market."

RANKING OF SOCIAL ATTITUDES
"COMPLETELY/SOMEWHAT AGREE"

	Percent
I Like To Listen To Latin Music	92.2%
I Am Proud To Be Hispanic And I Think Our Culture/Traditions Should Be Preserved And Kept	91.0
I Like To Watch Spanish Television	83.9
The Popular Name Brands I Use Most Often Today Are Going To Be The Same Brands I Will Be Using Next Year	81.9
I Prefer To Buy Products From Companies That Recognize The Hispanic Market	80.7
Nationally Advertised And Popular Name Brands Are The Best Products For My Family	72.0
I Prefer To Buy From Shops With Spanish Speaking Personnel	71.6

Source: Strategy Research Corporation

Seven out of ten Hispanics in San Diego completely/somewhat agreed with the statement: "Nationally advertised and popular name brands are the best products for my family" (72.0%)..

A total of 72.0% completely/somewhat agreed with: "I prefer to buy from shops with Spanish speaking personnel". This last statement is the least important among all survey respondents. As discussed earlier in this report, 36.9% of the respondents can speak English very well/well and 38.3% are fairly conversant. Thus, it is not surprising to find out that Hispanics in San Diego do not find it crucial that the store where they shop have personnel who speak Spanish.

VI. SHOPPING PATTERNS

San Diego Hispanics were asked a series of questions regarding food store patronage. Average weekly food store expenditures were also measured.

The survey also focused on Hispanics' patronage of convenience stores, department stores, drug stores and discount outlets.

Past month visitation of enclosed shopping malls was also a point of query, as well as the frequency of patronage.

A. FOOD STORE PATRONAGE

1. Types Of Stores Patronized -- Past Week

Initially, all survey respondents were read a list of different types of food stores and asked if they had made any purchases at the particular type of store in question in the past week. Additionally, they were asked to state how much they spend on a weekly basis at each type of store. The three types of stores were:

- American Supermarket Chain
- Latin Market/Mercado
- Membership Discount Store

A chain supermarket is classified as one which has at least six check-out counters, while a neighborhood grocery store has approximately one to three check-out lanes.

Nearly nine out of every ten Hispanics interviewed (89.1%) had shopped at an American supermarket chain such as Ralph's, Von's, Lucky's or Big Bear within the past week.

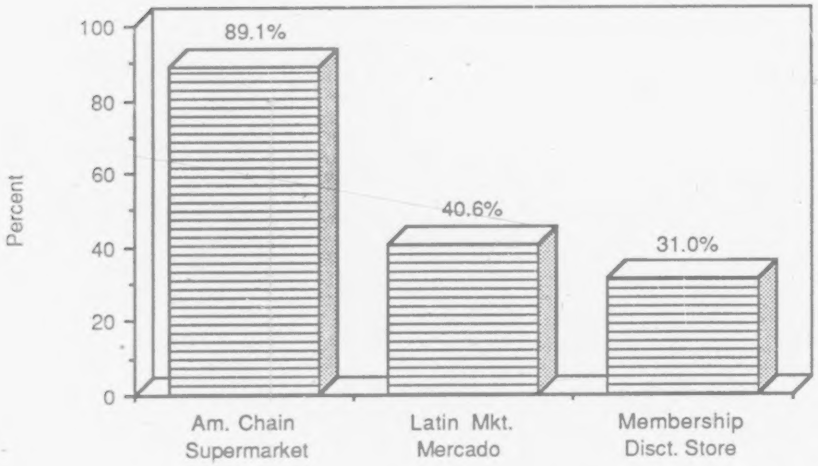
FOOD STORES PATRONIZED
PAST WEEK

	Percent
American Supermarket Chain	89.1%
Latin Market/Mercado	40.6
Membership Discount Store	31.0

Source: Strategy Research Corporation

Two out of every five Hispanics (40.6%) interviewed also shopped at a Latin market or *mercado* in the past week, and 31.0% patronized a membership discount store such as Price Club.

FOOD STORE PATRONAGE



Source: Strategy Research Corporation

2. Weekly Food Store Expenditures

All survey respondents were asked approximately how much they spend weekly on purchases made in each of the three types of food stores.

The average weekly expenditure among Hispanics at American supermarket chains is $77.37, which calculates to approximately $4,023.24 annually.

AVERAGE FOOD STORE EXPENDITURES

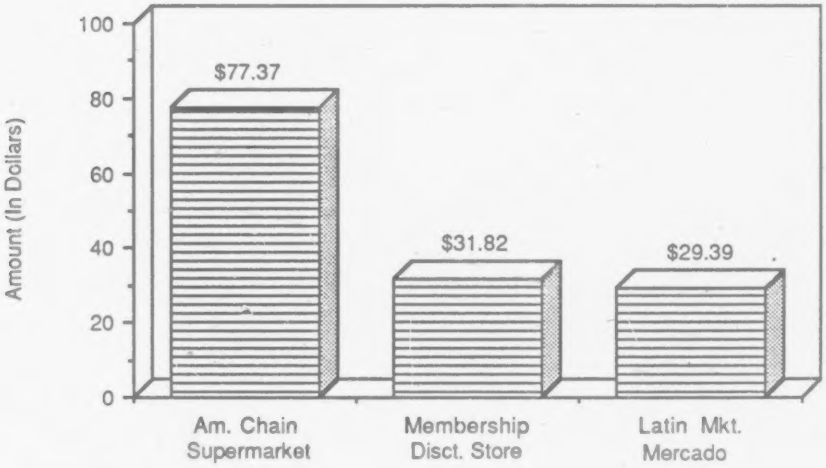
	Weekly	Yearly
American Supermarket Chain	$77.37	$4,023.24
Membership Discount Store	31.82	1,654.64
Latin Market/Mercado	29.39	1,528.28

Source: Strategy Research Corporation

Weekly expenditures at membership discount stores such as Price Club approximate $31.82. On an yearly basis, Hispanics in San Diego spend approximately $1,654.64 at these type of stores.

San Diego Hispanics spend an average of $29.39 weekly on purchases made at Latin markets and $1,528.28 annually.

WEEKLY EXPENDITURES



Source: Strategy Research Corporation

B. PATRONAGE OF OTHER TYPES OF STORES

1. Convenience Store Patronage

All survey respondents were asked, "Do you or anyone else in this household ever patronize convenience stores like 7-Eleven or AM/PM?"

INCIDENCE OF
CONVENIENCE STORE PATRONAGE

	Percent
Yes	76.9%
No	23.1
TOTAL	100.0%

Source: Strategy Research Corporation

Over three-fourths (76.9%) of Hispanic households in San Diego patronize convenience stores.

2. Frequency Of Patronage

Hispanics indicating patronage of convenience stores were asked to state how often they or any other member of their household visit these type of stores.

Convenience store patronage is relatively high. On average, Hispanics patronize one or more convenience stores approximately 13.1 times per month.

FREQUENCY OF PATRONAGE
CONVENIENCE STORES

	Percent
Everyday	25.3%
4-6 Times A Week	7.1
2-3 Times A Week	30.7
Once A Week	21.9
Three Times A Month	3.1
Twice A Month	1.9
Once A Month	6.3
Less Than Once A Month	3.7
TOTAL	100.0%
Average Visits Per Month	13.1

Source: Strategy Research Corporation

One-fourth of Hispanic households (25.3%) shop at convenience stores everyday and 7.1% frequent these stores 4-6 times a week. One-third visit convenience stores 2-3 times a week and 21.9% patronize once a week.

A total of 11.3% of the Hispanic households shop at convenience stores one to three times a month.

3. Other Retail Store Patronage

All Hispanic heads of household were asked if they had bought any type of merchandise at several types of retail stores in the past month. The retail stores in question were:

- Discount Store
- Department Store
- Drug Store

Two-thirds of Hispanics surveyed (67.9%) shopped at a discount store such as K-Mart or Target in the past month.

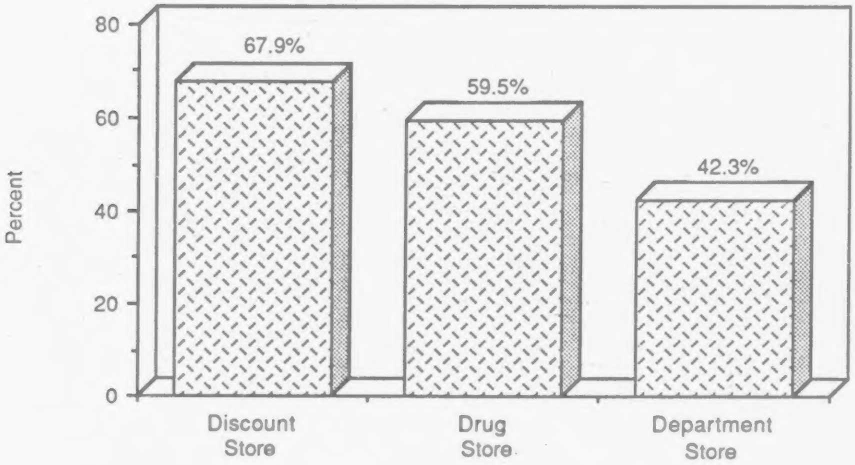
RETAIL STORES PATRONIZED IN THE PAST MONTH

	Percent
Discount Store	67.9%
Drug Store	59.5
Department Store	42.3

Source: Strategy Research Corporation

In the past month, more than one-half (59.5%) also patronized a drug store and 42.3% shopped at a department store such as May Company or Broadway.

PAST MONTH PATRONAGE



Source: Strategy Research Corporation

C. ENCLOSED SHOPPING MALL PATRONAGE

Within the San Diego area there are several enclosed shopping malls catering to the consumer such as Fashion Valley, Chula Vista, Plaza Bonita, etc. In effect, retail outlets located in these malls offer the consumer a wide selection of merchandise product categories. How often do Hispanics in the San Diego area frequent these enclosed malls -- whether it be to patronize the larger anchor stores or the smaller specialty boutiques?

1. Patronage -- Past Month

All survey participants were asked whether they had been to an enclosed shopping mall within the past month.

PATRONAGE OF ENCLOSED SHOPPING MALLS
IN THE PAST MONTH

	Percent
Yes	67.5%
No	32.5
TOTAL	100.0%

Source: Strategy Research Corporation

Slightly more than two-thirds of Hispanics interviewed (67.5%) indicated having shopped at enclosed shopping malls in the past month.

2. Frequency Of Patronage

All survey participants who indicated having shopped at an enclosed mall within the past month were asked to state the number of times they had been to these type of concentrated retail locations within the past month.

Hispanics in San Diego are frequent shoppers at enclosed shopping malls. On average, Hispanics who patronize enclosed shopping malls do so approximately 2.1 times per month.

FREQUENCY OF PATRONAGE OF ENCLOSED SHOPPING MALLS WITHIN THE PAST MONTH

	Percent
One Time	41.7%
Two Times	35.7
Three Times	8.9
Four Times	7.7
Five Times	2.2
Six Or More Times	3.8
TOTAL	100.0%
Average Visits Per Month	2.1

Four out of every five Hispanics interviewed (41.7%) indicated having visited an enclosed shopping mall once in the past month. Nearly one-third (35.7%) shopped at malls twice in the past month, while an additional 8.9% went three times. A total of 13.7% of the Hispanics surveyed paid these malls four or more visits in the past month.

D. AREA SHOPPED FOR MAJOR PURCHASES

All survey respondents were asked, "For a major purchase such as a car, major appliance or furniture, would you shop for the best price all over San Diego County or just locally?"

More than one-half of the respondents compare prices among local stores, whereas 40.5% venture outside their immediate area and shop county-wide.

AREA SHOPPED
FOR MAJOR PURCHASES

	Percent
Locally	59.5%
County	40.5
TOTAL	100.0%

Source: Strategy Research Corporation

VII. RESTAURANT PATRONAGE

Do Hispanics in San Diego eat at restaurants? What type of restaurants do they frequent? What kind of food do they eat most often? This section of the report presents data regarding San Diego Hispanics' patronage of hamburger, chicken, pizza, and Mexican fast food restaurants as well as their patronage of non-fast food restaurants with table service.

A. FAST FOOD RESTAURANT PATRONAGE

1. Incidence Of Patronage

All survey respondents were asked a series of questions regarding their incidence of patronage and the frequency of visitation for the following four types of fast food restaurants:

- Hamburger
- Chicken
- Pizza
- Mexican

Patronage is relatively high for all four types of fast food restaurants. More than eight out of every ten Hispanic households eat at or take out food from hamburger (88.3%) and chicken (84.0%) fast food restaurants.

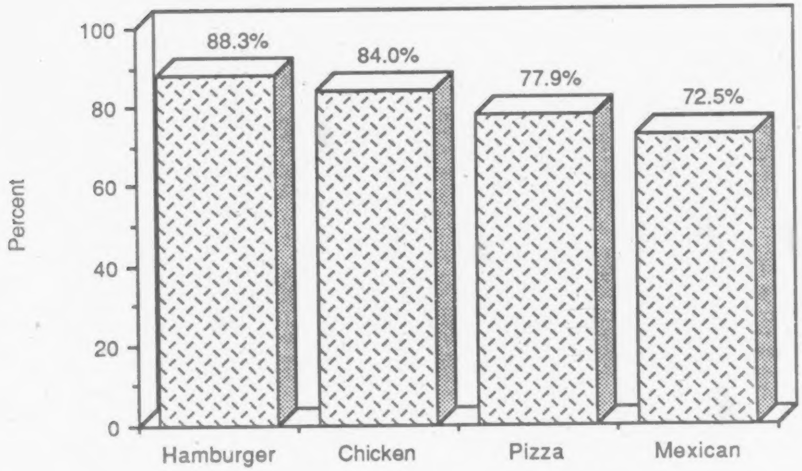
INCIDENCE OF PATRONAGE
FAST FOOD RESTAURANTS

	Percent
Hamburger	88.3%
Chicken	84.0
Pizza	77.9
Mexican	72.5

Source: Strategy Research Corporation

More than three-fourths (77.9%) of San Diego Hispanic households frequent pizza fast food restaurants and 72.5% patronize Mexican fast food restaurants.

INCIDENCE OF FAST FOOD CONSUMPTION



Source: Strategy Research Corporation

2. Frequency Of Patronage

All survey respondents were asked, "How often do you or any other member of your family eat at or buy food to take out at a fast food or quick service hamburger/chicken/pizza/Mexican restaurant?"

Although fast food hamburger restaurants are patronized by more Hispanic households, the frequency of visitation registers higher for Mexican fast food restaurants. Mexican fast food restaurants are visited an average of 8.9 times per month by Hispanic households that patronize this type of restaurant.

Hispanic households that patronize fast food hamburger restaurants do so an average of 5.4 times per month.

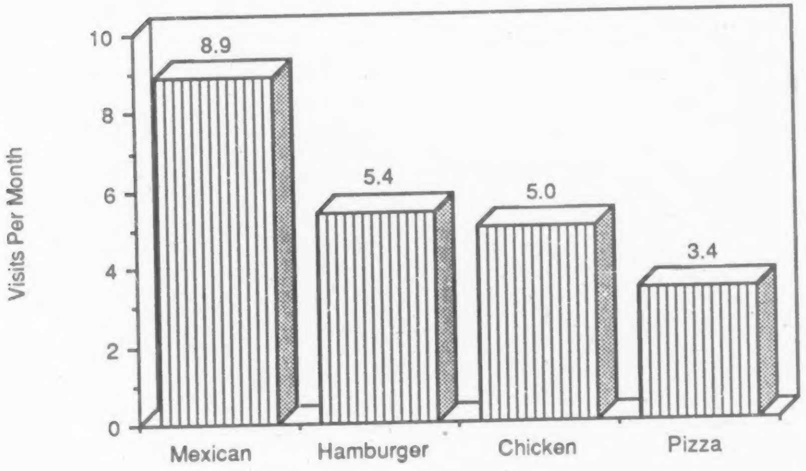
FREQUENCY OF PATRONAGE
FAST FOOD RESTAURANTS

	Average Number Of Times/Month
Mexican	8.9
Hamburger	5.4
Chicken	5.0
Pizza	3.4

Source: Strategy Research Corporation

Fast food chicken restaurants are frequented an average of 5.0 times per month among Hispanic households that patronize this type of restaurant. Hispanic households in San Diego eat at or take out pizza an average of 3.4 times per month.

FAST FOOD RESTAURANTS
AVERAGE NUMBER OF VISITS PER MONTH



Source: Strategy Research Corporation

3. Annual Patronage

The table below indicates that fast food restaurants are very popular among San Diego Hispanics. More than three-fourths of all Hispanic households patronize one or more of the four types of fast food restaurants. In addition, the amount of dollars spent annually at these restaurants is estimated at $52 million, an impressive dollar amount.

To illustrate, a total of 86,855 Hispanic households (or 72.5%) eat at or take out food from a Mexican fast food restaurant an average of 8.9 times per month. On an annual basis, Mexican fast food restaurants are visited an average of 9.3 million times by Hispanic households. Based on an average expenditure of $2.00 per visit, a total of $18.6 million dollars are spent annually by Hispanic households at Mexican fast food restaurants.

Hamburger fast food restaurants are frequented approximately 5.4 times per month by 105,783 Hispanic households. Annually, these households patronize hamburger fast food restaurants an average of 6.9 million times and spend an average of $13.8 million.

ANNUAL PATRONAGE
FAST FOOD RESTAURANTS

	Number Of Households That Visit	Average Number Of Times/Month	Total Annual Visits
Mexican	86,855	8.9	9,276,114
Hamburger	105,783	5.4	6,854,738
Chicken	100,632	5.0	6,037,920
Pizza	93,324	3.4	3,807,619

Source: Strategy Research Corporation

A total of 100,632 Hispanic households eat at or take food from a fast food chicken restaurant an average of 5.0 times per month. Annually, these households patronize chicken fast food restaurants an average of 6.0 million times and spend an average of $12.0 million.

Fast food pizza restaurants are frequented 3.8 million times per year by 93,324 households. On an annual basis, these households spend approximately $7.6 million.

B. NON-FAST FOOD RESTAURANT PATRONAGE

All survey participants were queried regarding their patronage of non-fast food restaurants. Non-fast food restaurants are classified as those restaurants with table service (i.e., waitress, busboy, etc.).

In addition to patronizing fast food restaurants, 66.1% of the Hispanic households in San Diego also frequent non-fast food restaurants with table service. On average, Hispanic households visit non-fast food restaurants 3.0 times per month.

INCIDENCE & FREQUENCY OF PATRONAGE NON-FAST FOOD RESTAURANTS

Yes, Patronize	Average Number Of Times/Month
66.1%	3.0

Source: Strategy Research Corporation

Thus, a total of 79,188 Hispanic households in San Diego patronize non-fast food restaurants with table service 3.0 per month. This number calculates to 2.8 million annual visits among all Hispanic households that indicated patronizing this type of restaurant.

VIII. PRODUCT USAGE

This section of the report presents data regarding San Diego Hispanics' purchasing and usage habits for the following products:

- Carbonated Soft Drinks
- Beer
- Snack Foods & Vitamins
- Cosmetics & Personal Care Products For Women
- Personal Care Products For Men

In addition, all survey participants were asked to state how frequently they purchase carbonated soft drinks and beer for their home.

A. CARBONATED SOFT DRINKS

1. In-Home Consumption

Carbonated soft drinks are indeed a very popular beverage among Hispanics in the San Diego area. These beverages are consumed by approximately 105,424 Hispanic households.

IN-HOME CONSUMPTION
CARBONATED SOFT DRINKS

	Percent
Yes	88.0%
No	12.0
TOTAL	100.0%

Source: Strategy Research Corporation

Carbonated soft drinks are consumed by at least one family member in eight out of ten Hispanic households. Specifically, 88.0% of Hispanics interviewed indicated consumption of this beverage in their home. Thus, the ratio of in-home consumption to non-consumption is 7.3:1.

2. Frequency Of Purchase

Survey participants who indicated in-home consumption of carbonated soft drinks were asked, "How often would you say that you and your family buy carbonated soft drinks in this household?"

Overall, over nine out of ten Hispanic households (92.6%) purchase carbonated soft drinks on a weekly basis. Specifically, one-third of Hispanics who buy carbonated soft drinks (36.25) do so everyday, while 7.2% purchase these beverages an average of 4-5 times a week.

FREQUENCY OF PURCHASE CARBONATED SOFT DRINKS

	Percent
Everyday	36.2%
4-5 Times A Week	7.2
2-3 Times A Week	18.4
Once A Week	30.8
2-3 Times A Month	2.4
Once A Month	2.1
Less Than Once A Month	2.9
TOTAL	100.0%
Average Number Of Times Per Week	4.1

Source: Strategy Research Corporation

Nearly one-half of the Hispanics buy carbonated soft drinks 1-3 times a week and 4.5% purchase these beverages 1-3 times a month.

On average, Hispanics in San Diego purchase carbonated soft drinks 4.1 times a week.

B. BEER

1. In-Home Consumption

Slightly over one-half of all Hispanics interviewed in the San Diego area (53.6%) indicated that beer is consumed at home by someone in their household.

IN-HOME CONSUMPTION
BEER

	Percent
Yes	53.6%
No	46.4
TOTAL	100.0%

Source: Strategy Research Corporation

Thus, beer is consumed in approximately 64,213 Hispanic households.

2. Frequency Of Purchase

Nearly three-fourths of Hispanics who consume beer (74.8%) purchase it on a weekly basis. Specifically, 10.2% of the Hispanics purchase beer everyday while an additional 1.8% purchase beer 4-5 times a week.

A total of 62.8% of all beer-drinking Hispanic households purchase this alcoholic beverage 1-3 times a week.

FREQUENCY OF PURCHASE
BEER

	Percent
Everyday	10.2%
4-5 Times A Week	1.8
2-3 Times A Week	21.3
Once A Week	41.5
2-3 Times A Month	10.0
Once A Month	10.2
Less Than Once A Month	5.0
TOTAL	100.0%
Average Number Of Times Per Week	3.1

Source: Strategy Research Corporation

One-fifth of the respondents (20.2%) indicated that beer is purchased by someone in their household 1-3 times a month.

On average, beer is purchased 3.1 times per month by Hispanic households in San Diego.

C. SNACK FOODS AND VITAMINS

All Hispanics interviewed were queried regarding their consumption of snack foods (specifically cookies, candy bars and chips) and vitamins.

Of the four products in question, cookies registered the highest level of in-home consumption (86.1%). A total of 81.9% of the Hispanic households in San Diego purchase chips for their home.

IN-HOME CONSUMPTION
SNACK FOODS AND VITAMINS

	Percent
Cookies	86.1%
Chips	81.9
Vitamins	78.4
Candy Bars	76.5

Source: Strategy Research Corporation

Vitamins can be found in nearly eight out of ten Hispanic households in San Diego (78.4%). Slightly over three-fourths of the Hispanic households (76.5%) also purchase candy bars for their home.

D. COSMETICS AND PERSONAL CARE PRODUCTS AMONG WOMEN

All survey respondents were asked a series fo questions regarding the usage of cosmetics and personal care products among female members of their household.

Specifically, they were queried regarding the usage of:

- Eye Shadow
- Mascara
- Blush
- Lipstick
- Nail Polish
- Perfume/Toilet Water
- Hair Coloring
- Hairspray, Mousse, Gels
- False Nails
- Foundation/Liquid Make-Up

The Hispanic woman's usage of cosmetics is relatively high in all product categories surveyed, especially perfume/toilet water, lipstick, nail polish, blush and mascara.

Eight out of ten Hispanic households have one or more female members who use perfume/toilet water (80.3%) and lipstick (79.0%). Nail polish is used by 72.5% of the Hispanic females in San Diego.

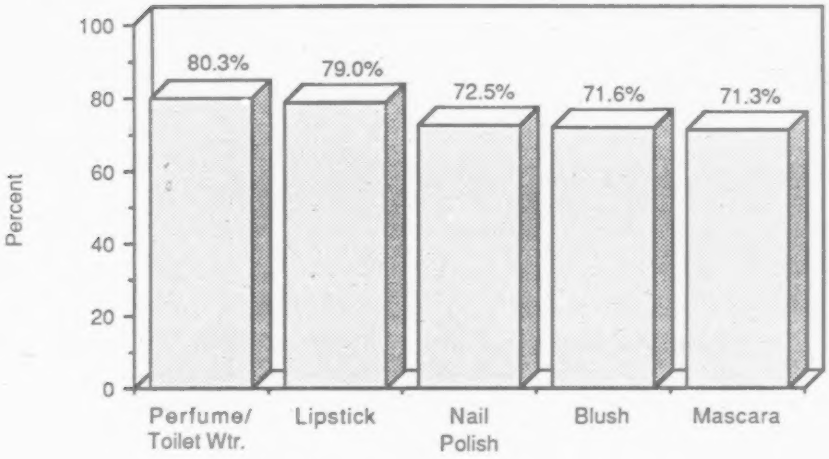
USAGE
PERSONAL CARE PRODUCTS AMONG WOMEN

	Percent
Perfume/Toilet Water	80.3%
Lipstick	79.0
Nail Polish	72.5
Blush	71.6
Mascara	71.3
Eye Shadow	69.5
Hairspray, Mousse, Gels	67.5
Foundation/Liquid Make-Up	60.9
Hair Coloring	46.2
False Nails	27.7

Source: Strategy Research Corporation

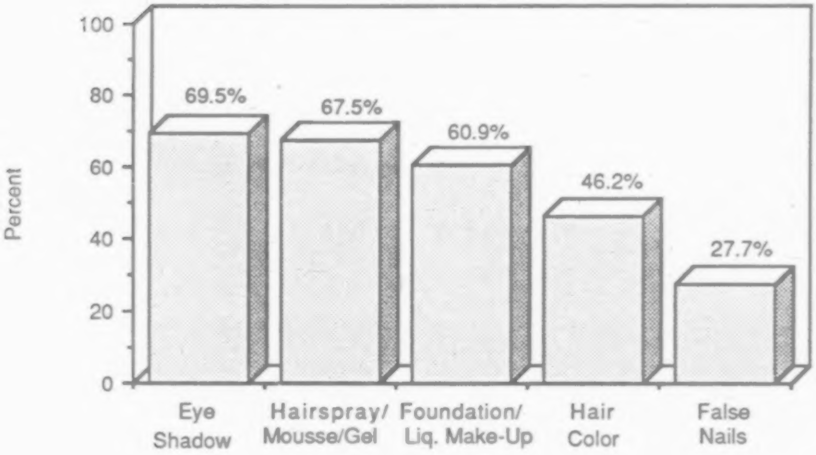
Blush and mascara registered similar levels of use among Hispanic females in San Diego (71.6% and 71.3%, respectively). Nearly seven out of ten Hispanic households have at least one female who uses eye shadow (69.5%). An additional 67.5% use hairspray, mousse and/or gels.

USE OF PERSONAL CARE PRODUCTS AMONG WOMEN



Source: Strategy Research Corporation

USE OF PERSONAL CARE PRODUCTS AMONG WOMEN



Source: Strategy Research Corporation

E. PERSONAL CARE PRODUCTS AMONG MEN

The survey examined the use of personal care products by men. The products in question were:

- Shaving Cream
- After Shave Lotion/Cologne
- Hair Styling Gel, Cream Or Oil
- Electric Shaver

After shave lotion/cologne and shaving cream are the two products with the highest level of use among Hispanic men)84.9% and 62.7%, respectively).

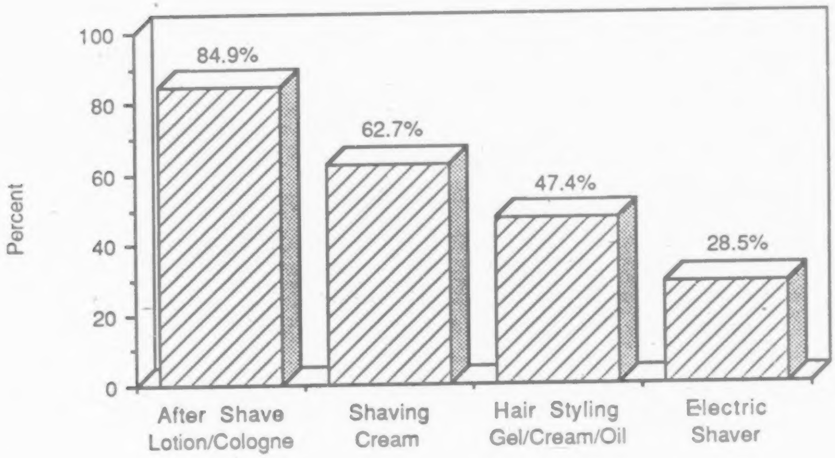
USAGE
PERSONAL CARE PRODUCTS
AMONG MEN

	Percent
After Shave Lotion/Cologne	84.9%
Shaving Cream	62.7
Hair Styling Gel, Cream or Oil	47.4
Electric Shaver	28.5

Source: Strategy Research Corporation

Nearly one-half of the Hispanic households (47.4%) have at least one male member who uses hair styling gel, cream or oil. Electric shavers can be found in 28.5% of the Hispanic households in San Diego.

USE OF PERSONAL CARE PRODUCTS AMONG MEN



Source: Strategy Research Corporation

IX. OWNERSHIP PATTERNS

This section of the report presents data regarding San Diego Hispanics' ownership of various types of consumer goods and services. Specifically, survey participants were queried regarding their ownership of:

- Vehicle Ownership
- Insurance Ownership
- Home Ownership
- Audio/Visual & Small Appliances
- Financial Relationships
- Pet Ownership

A. VEHICLE OWNERSHIP

How many Hispanic households own a car, truck or van? How many of these vehicles do they own? Do they have insurance for their vehicles?

1. Incidence Of Ownership

All Hispanic respondents were asked if anyone in their household owned a vehicle such as a car, truck or van.

The incidence of vehicle ownership is relatively high among Hispanics in San Diego. A total of 89.5% of Hispanic households own at least one car, truck or van.

VEHICLE OWNERSHIP

	Percent
Yes	89.5%
No	10.5
TOTAL	100.0%

Source: Strategy Research Corporation

Thus, a total of 107,221 Hispanic households have vehicles. The ratio of vehicle ownership to non-ownership among Hispanics in San Diego is 8.5:1.

2. Number Of Vehicles Owned

All vehicle-owning households were asked to state the total number of vehicles owned by all the members of their household.

San Diego Hispanics have a strong likelihood of multiple vehicle ownership. The average Hispanic household has 2.0 vehicles, whether they be cars, trucks, or vans.

NUMBER OF
VEHICLES OWNED

	Percent
One	40.4%
Two	34.5
Three	17.8
Four	3.9
Five	1.7
Six	0.9
More Than Six	0.8
TOTAL	100.0%
Average Number Of Vehicles	2.0

Source: Strategy Research Corporation

Two-fifths of the Hispanic vehicle-owning households (40.4%) have one car, truck or van while 34.5% have two vehicles. A total of 17.8% of the Hispanic households surveyed own three vehicles and 7.3% own four or more vehicles.

3. Car Insurance Ownership

Next, all respondents who indicated vehicle ownership by his/her household was asked, "Does anyone in your household have car insurance?"

Slightly over three-fourths of the vehicle-owning Hispanic households (75.4%) have car insurance for their car, truck or van.

INCIDENCE OF OWNERSHIP
CAR INSURANCE

	Percent
Yes	75.4%
No	24.5
TOTAL	100.0%

Source: Strategy Research Corporation

The next subsection presents data regarding home ownership among San Diego Hispanics.

B. HOME OWNERSHIP

Buying a home is a very important financial decision among most families. Home ownership among Hispanics, however, has a significance beyond the simple acquisition of property. The decision to buy a home signifies financial stability to some degree, deciding to establish one's family in a designated area, and becoming enrooted in a community.

All survey respondents were queried regarding their present home ownership as well as their future plans for purchasing a home.

1. Incidence Of Home Ownership

Slightly over one-third of all Hispanics surveyed own their own home (39.2%), while 60.8% rent the home in which they live.

HOME OWNERSHIP
AMONG HISPANICS

	Percent
Rent	60.8%
Own	39.2
TOTAL	100.0%

Source: Strategy Research Corporation

2. Intention To Buy A Home Within The Next Year

Slightly over one-fourth of the Hispanics who currently rent (25.4%) plan to buy a home within the next 12 months, whereas 17.0% of present homeowners intend to buy another home within the same time frame.

INTENT TO PURCHASE A HOME
WITHIN THE NEXT YEAR

	Currently Rent	Currently Own
Yes	25.4%	17.0%
No	74.6	83.0
TOTAL	100.0%	100.0%

Source: Strategy Research Corporation

Overall, Hispanics in San Diego have a strong likelihood of purchasing a home within the next year.

C. INSURANCE COVERAGE

All survey respondents were queried regarding their household's ownership of three different types of insurance. The types of insurance in question were:

- Life Insurance
- Medical Insurance
- Homeowner's Insurance

Incidence of ownership registered highest for medical insurance (63.9%). Almost seven out of every ten Hispanic households has at least one member who is covered by a medical insurance policy. A total of 42.7% of the Hispanic households have life insurance and 38.1% have homeowner's insurance.

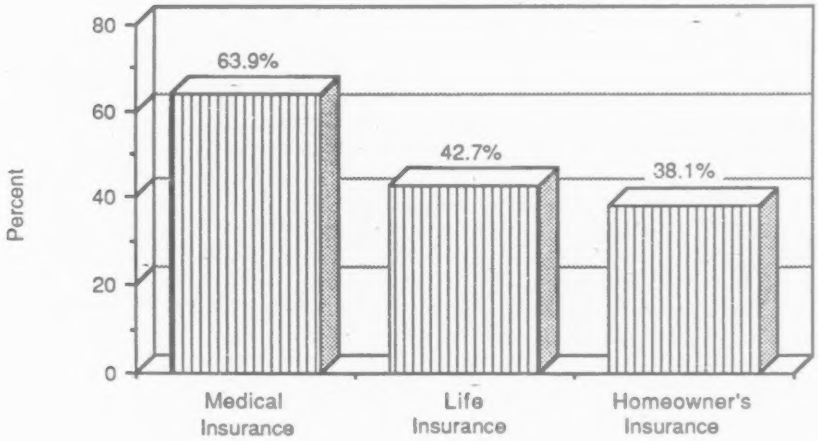
INSURANCE COVERAGE
AMONG HISPANIC HOUSEHOLDS

	Percent
Medical Insurance	63.9%
Life Insurance	42.7
Homeowner's Insurance	38.1

Source: Strategy Research Corporation

Thus, a total of 76,552 Hispanic households have at least one member who is covered by medical insurance; and additional 51,155 households have life insurance coverage; and 45,644 Hispanic households have homeowner's insurance.

INSURANCE COVERAGE
AMONG HISPANIC HOUSEHOLDS



Source: Strategy Research Corporation

D. AUDIO/VISUAL AND SMALL APPLIANCES

Next, all survey respondents were queried regarding their household's ownership of the following home entertainment items and small appliances:

- Microwave Oven
- Stereo
- Compact Disc Player
- Video Cassette Recorder (VCR)
- Television Set

1. Incidence Of Ownership

Incidence of ownership registered highest for television set. Virtually all Hispanic households surveyed (97.7%) own a television set. Slightly over two-thirds (67.5%) of the Hispanic households have a stereo.

INCIDENCE OF OWNERSHIP
AUDIO/VISUAL AND SMALL APPLIANCES

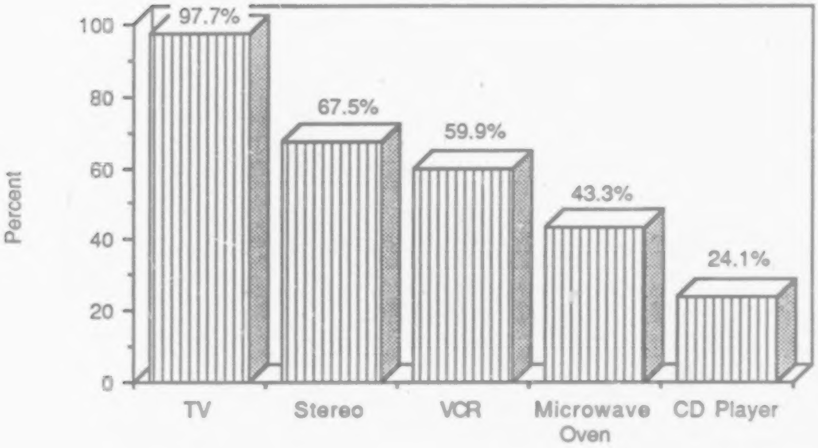
	Percent
Television Set	97.7%
Stereo	67.5
VCR	59.9
Microwave Oven	43.3
Compact Disc Player	24.1

Source: Strategy Research Corporation

VCRs can be found in nearly six out of every ten Hispanic households in San Diego (59.9%). Forty-three percent of the households surveyed (43.3%) reported ownership of a microwave oven.

Almost one-fourth of Hispanic households in San Diego (24.1%) have a compact disc player. The ownership of CD players registers relatively high for this new market entry. This may be due to their increasing popularity, their quality of the sound and the availability of "vintage" albums on compact discs.

OWNERSHIP OF AUDIO/VISUAL & SMALL APPLIANCES



Source: Strategy Research Corporation

2. Cable Television Subscription

A total of 117,045 Hispanic households have at least one television set. All television-owning households surveyed were then queried regarding the incidence of cable service in their home.

Cable television service registers relatively high among Hispanics in San Diego. Nearly one-half of all television-owning households are cable television subscribers (47.8%).

INCIDENCE OF CABLE TELEVISION SUBSCRIPTION

	Percent
Yes	47.8%
No	52.2
TOTAL	100.0%

Source: Strategy Research Corporation

The next subsection presents data regarding San Diego Hispanics' financial relationships.

E. FINANCIAL RELATIONSHIPS

Hispanics were queried regarding their current interaction with a bank and/or savings and loan association . Survey respondents were asked about the presence of a checking and/or savings account.

Survey respondents were asked whether they themselves or any other member of their household currently had a savings account or a checking account.

INCIDENCE OF HAVING
CHECKING AND SAVINGS ACCOUNT

	Percent
Savings Account	54.1%
Checking Account	47.9

Source: Strategy Research Corporation

Slightly more than one-half of Hispanic households (54.1%) have at least one member who currently maintains a savings account, while 47.9% have a checking account.

F. HOUSEHOLD PETS

The incidence of ownership of household pets (such as dogs, cats, birds, fish, etc.) among Hispanic households was also measured.

Currently one-third of all Hispanic households (33.9%) surveyed in the San Diego area have at least one pet.

INCIDENCE OF PET OWNERSHIP

	Percent
Yes	33.9%
No	66.1
TOTAL	100.0%

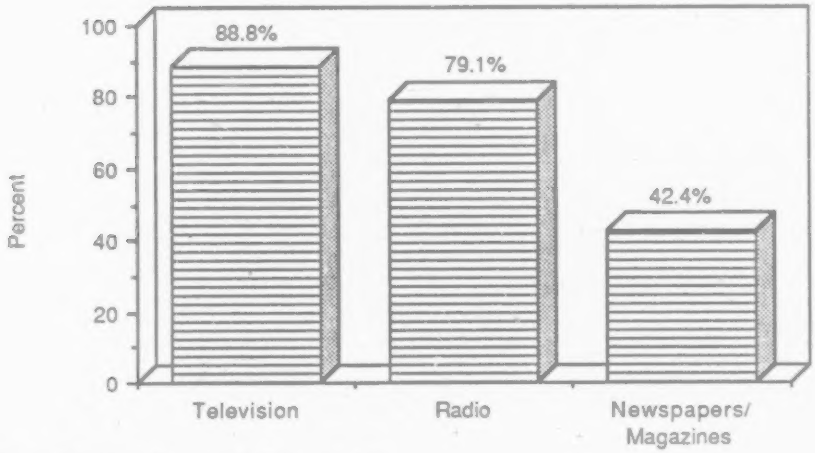
Source: Strategy Research Corporation

The next section presents data regarding the media habits of San Diego Hispanics.

X. MEDIA HABITS

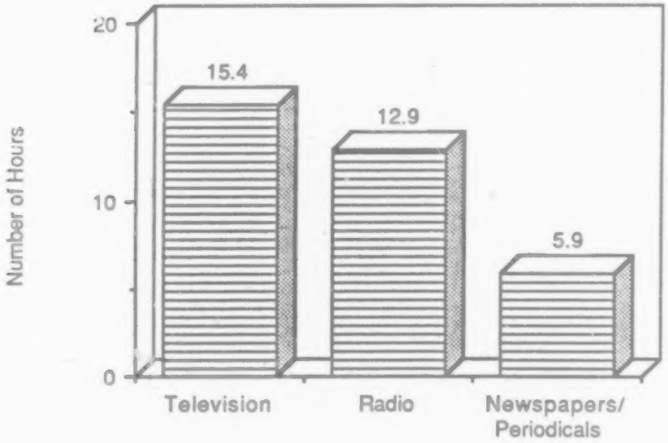
In order to measure San Diego Hispanics' Spanish-language media habits, all survey respondents were asked a series of questions regarding their viewership, listenership and readership of Spanish-language television, radio and periodicals as well as the amount of time they spend in an average week doing so.

INCIDENCE OF VIEWING/LISTENING/READING SPANISH-LANGUAGE MEDIA



Source: Strategy Research Corporation

AVERAGE NUMBER OF HOURS PER WEEK



Source: Strategy Research Corporation

A. SPANISH-LANGUAGE TELEVISION

Nearly nine out of ten Hispanics in San Diego watch Spanish-language television (88.8%). On average, these Hispanics watch 15.4 hours of Spanish-language television in a typical week.

INCIDENCE & AMOUNT
OF VIEWERSHIP
SPANISH-LANGUAGE TELEVISION

Yes, Watch	Average Number Of Hours/Week	Watched Yesterday
88.8%	15.4 hrs.	77.8%

Source: Strategy Research Corporation

Slightly over three-fourths of all respondents who watch Spanish-language television (77.8%) indicated that they had watched the day before ("yesterday").

B. SPANISH-LANGUAGE RADIO

More than three-fourths of Hispanics in San Diego listen to Spanish-language radio stations (79.1%). On average, these Hispanics listen to 12.9 hours of Spanish-language radio in a typical week.

INCIDENCE & AMOUNT
OF LISTENERSHIP
SPANISH-LANGUAGE RADIO

Yes, Listen	Average Number Of Hours/Week	Listened Yesterday
79.1%	12.9 hrs.	77.3%

Source: Strategy Research Corporation

Slightly over three-fourths of all respondents who listen to Spanish-language radio stations (77.3%) reported listening the day before ("yesterday").

C. SPANISH-LANGUAGE PERIODICALS

Spanish-language periodicals such as magazines and newspapers are read by 42.4% of the Hispanics surveyed. On average, these Hispanics spend approximately 5.9 hours in a typical week reading Spanish-language periodicals.

INCIDENCE & AMOUNT OF READERSHIP SPANISH-LANGUAGE PERIODICALS

Yes, Read	Average Number Of Hours/Week	Read Yesterday
42.4%	5.9 hrs.	55.1%

Source: Strategy Research Corporation

More than one-half of all respondents who read Spanish-language magazines and newspapers (55.1%) indicated having read a magazine or newspaper the day before ("yesterday").

D. SOURCE OF LOCAL NEWS

All survey respondents were asked what they considered their primary source for local news as well as how often they watch local news programs on television.

1. Primary Source For Local News

More than eight out of ten Hispanics in San Diego (86.2%) obtain most of their local news information by watching television.

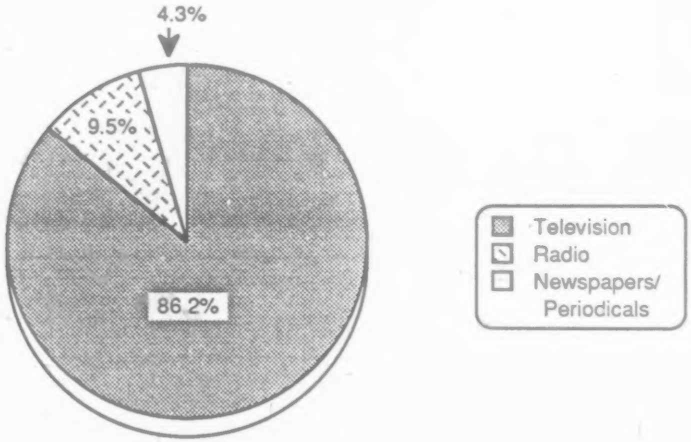
PRIMARY SOURCE OF LOCAL NEWS

	Percent
Television	86.2%
Radio	9.5
Newspaper	4.3
TOTAL	100.0%

Source: Strategy Research Corporation

Local news acquired via the radio is preferred over local news information obtained by reading the newspaper (9.5% versus 4.3%, respectively).

PRIMARY SOURCE OF LOCAL NEWS



Source: Strategy Research Corporation

2. Frequency Of Viewing Local News Television Broadcasts

All survey participants were asked, "How often do you watch local news on television?" Overall, Hispanics in San Diego are frequent viewers of television news broadcasts. More than eight out of every ten Hispanics in San Diego (87.4%) watch the local news broadcast on television on a daily basis. A total of 7.5% of the respondents watch the local news on television 1-3 times per week and 2.9% watch it 4-6 times per week.

FREQUENCY OF WATCHING
LOCAL NEWS ON TELEVISION

	Percent	
Yes, Watch	**99.0%**	
Daily		87.4%
4-6 Times Per Week		2.9
1-3 Times Per Week		7.5
Less Than Once A Week		1.2
Do Not Watch	**1.0**	
TOTAL	100.0%	99.0%
Average Times Per Week	6.4	

Source: Strategy Research Corporation

Only 1.2% of the respondents watch the local news television broadcast less than once a week and 1.0% do not watch the local news on television.

XI. TRAVEL PATTERNS

Travel between the cities of San Diego and Tijuana is not an uncommon practice among the residents of San Diego due to its close proximity to the U.S./Mexico border. San Diego is also relatively close to Los Angeles (approximately two hours by car) as well as Palm Springs and the neighboring state of Arizona.

A. METHOD USED FOR TRAVEL

All survey respondents were asked what mode of transportation they used on their last trip out of the San Diego area.

The automobile was the most popular method of transportation. Almost one-half of the respondents (49.4%) traveled by car the last time they traveled outside the San Diego area.

Slightly more than one-fourth of the Hispanics (27.8%) traveled by air and 14.4% traveled by bus.

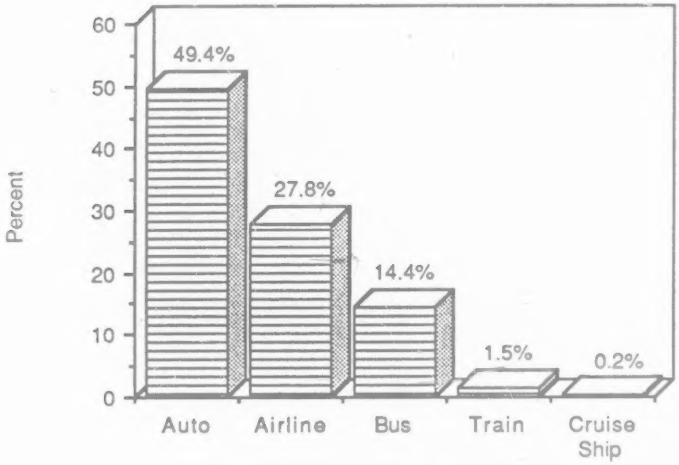
MEANS OF TRANSPORTATION
LAST TRIP OUT OF SAN DIEGO

	Percent
Automobile	49.4%
Airline	27.8
Bus	14.4
Train	1.5
Cruise Ship	0.2
Other	0.1
Never Left	6.6
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 1.5% of the Hispanics surveyed took their last trip out of San Diego by train and 0.2% went on a cruise ship.

MEANS OF TRANSPORTATION USED ON LAST TRIP OUT OF SAN DIEGO



Source: Strategy Research Corporation

B. PURPOSE OF LAST TRIP

What were the primary reasons for traveling outside the San Diego area? Did survey respondents travel for business purposes, for pleasure or vacation, for personal reasons, or did they combine business and pleasure on their last trip? Those respondents who had traveled out of San Diego were next asked the purpose of their last trip.

Almost two-thirds (65.5%) of the respondents mentioned pleasure/vacation as the purpose of their last trip out of San Diego. One-fifth traveled for personal reasons. This category includes travel for family matters (such as weddings, reunions, baptisms, etc.) as well as educational purposes, to resolve financial matters, and other related family/personal business.

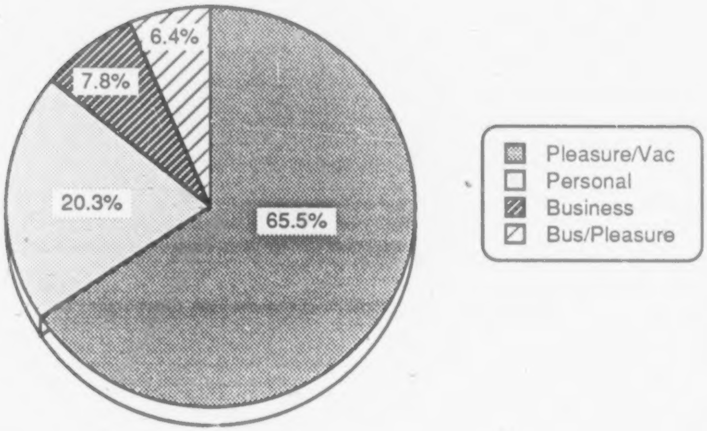
PURPOSE OF LAST TRIP OUT OF SAN DIEGO

	Percent
Pleasure/Vacation	65.5%
Personal	20.3
Business	7.8
Business/Pleasure	6.4
TOTAL	100.0%

Source: Strategy Research Corporation

A total of 7.8% of the respondents last traveled out of San Diego on business trips, and 6.4% traveled for business/pleasure reasons.

PURPOSE OF LAST TRIP



Source: Strategy Research Corporation

XII. LEISURE TIME ACTIVITIES

How do Hispanics in San Diego spend their leisure time? Where do they go? What do they do? The activities of these Hispanics provide insight about their interests and also about their social and family organization.

A. ATTENDANCE OF AMUSEMENT PARKS/ATTRACTIONS

San Diego is home to the San Diego Zoo, the largest zoo in the country, as well as the Wild Animal Park and Sea World. San Diego is also relatively close to several amusement parks in Los Angeles.

In order to gain a better understanding of social patterns and characteristics among Hispanics in the San Diego area, all survey respondents were asked if they themselves or any other member of their household had been to a variety of selected amusement parks or attractions within the past year.

Almost one-half (47.3%) of all Hispanic households had at least one member who had been to the San Diego Zoo within the past year, 40.6% had been to Sea World and 40.0% had visited Disneyland within the past year.

ATTRACTIONS/EVENTS ATTENDED IN THE PAST YEAR

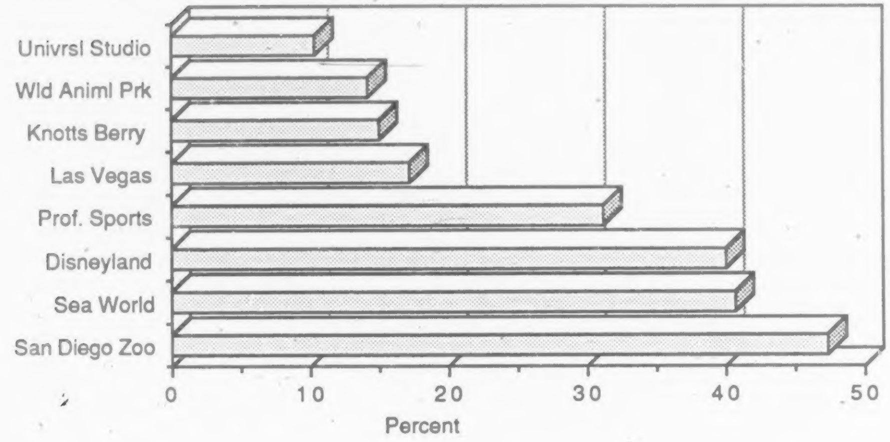
	Percent
San Diego Zoo	47.3%
Sea World	40.6
Disneyland	40.0
Professional Sports Events	31.2
Las Vegas	17.1
Knotts Berry Farm	15.0
Wild Animal Park	14.1
Universal Studios	10.4

Source: Strategy Research Corporation

Nearly one-third of the Hispanics (31.2%) stated that they and/or other household members had attended at least one professional sporting event in the past year. Seventeen percent of the respondents had visited Las Vegas and 14.1% had gone to the Wild Animal Park in the past year.

Knotts Berry Farm and Universal Studios, both in the Los Angeles area, were visited by 15.0% and 10.4% of the Hispanic households, respectively.

VISITATION OF AMUSEMENT PARKS/ ATTRACTIONS IN PAST YEAR



Source: Strategy Research Corporation

B. MOVIE THEATRE ATTENDANCE

Do Hispanics in San Diego go to the movies? How often do they go?

Taking into account the large percentage of Hispanics who own VCRs (59.9%) and those who have cable service (47.7%), it is interesting to see what their frequency of movie attendance is.

Overall, movie theatre attendance registered relatively high among Hispanics in San Diego. One-half of all survey respondents indicated going to the movies (49.1%).

FREQUENCY OF MOVIE ATTENDANCE

	Percent	
Go To The Movies	**49.1%**	
Once A Week		10.7%
2-3 Times A Month		5.7
Once A Month		15.8
Once Every 2 Months		2.2
Once Every 3-5 Months		2.3
Once Every Six Months		2.6
Less Than Once Every Six Months		9.8
Do Not Go To The Movies	50.9	
TOTAL	100.0%	49.1%
Average Times Per Month	0.8	

Source: Strategy Research Corporation

Overall, San Diego Hispanics frequent the movie theatre approximately once a month. The rate of attendance among San Diego Hispanics is comparable to Hispanics in other U.S. markets. To illustrate, Hispanics in the South Florida and Phoenix/Tucson areas also frequent the movie theatre once a month, while Hispanics in New York go less than once a month. The average frequency of movie theatre attendance among New York Hispanics is 7.2 times a year.

XIII. MALL INTERCEPT STUDY

As an adjunct to the San Diego Hispanic Market Study, Strategy Research Corporation conducted Mall Intercept Surveys at four regional shopping centers of the San Diego ADI. The purpose for conducting these interview surveys was to determine the amount of shopper patronage that these major San Diego area retail centers were attracting from south of the Mexican-American Border.

To this end, we conducted interviews among Hispanic shoppers at the following four regional malls in the San Diego Area:

- Chula Vista
- Plaza Bonita
- Plaza Camino Real
- Mission Valley

A. INCIDENCE OF BORDER CROSSING

The interviews were conducted only among those persons who were either observed to be or reported they were of Hispanic origin. Thus, interviews that were initiated with non-Hispanics were concluded once their non-Hispanic nationality or family origin was established. A combined total of approximately 1,200 interviews among persons of Hispanic origin were initiated at the four malls. Of these persons interviewed, approximately 63% reported they lived outside of the San Diego Area.

A total of 88.5% of Hispanic non-residents of San Diego crossed the border to do their shopping in the San Diego area.

INCIDENCE OF CROSSING THE BORDER
TO SHOP IN SAN DIEGO
AMONG HISPANIC NON-RESIDENTS OF SAN DIEGO

	Percent
Yes	88.5%
No	11.5
TOTAL	100.0%

B. FREQUENCY OF BORDER CROSSING SHOPPING TRIPS

Those respondents who had crossed the border to shop were asked how many times they crossed the border in an average month to shop in the San Diego Area. As shown on the following table, better than half (57.8%) of all these respondents reported crossing the border to shop in the San Diego Area at least once a week. Of these persons, approximately 23% said they cross the border to shop three or more times a week.

FREQUENCY OF CROSSING THE BORDER TO SHOP IN SAN DIEGO AREA

	Percent
5 Or More Times a Week	6.0%
3 Or 4 Times A Week	16.8
2 Times A Week	16.5
Once A Week	18.5
3 Times A Month	14.7
2 Times A Month	15.9
Once A Month	11.0
Less Than Once A Month	0.6
TOTAL	100.0%
Average Number Of Shopping Trips Per Month	6.7

On average, Hispanics cross the border to shop in San Diego approximately 6.7 times per month.

C. AVERAGE EXPENDITURES

Another question asked these respondents to report on what their average expenditure was when they crossed the border to shop in the San Diego Area.

As shown on the following table, nearly 57% of all the Hispanic, border crossing respondents reported their average expenditure per shopping trip in San Diego was $100.00 or more; 23% spend $200.00 or more and almost 15% spend $250.00 or more.

AVERAGE EXPENDITURE PER SHOPPING TRIP AMONG HISPANICS WHO CROSS THE BORDER

	Percent
Under $50.00	19.0%
$50.00 To $99.00	32.5
$100.00 To $149.99	15.3
$150.00 To $199.99	8.1
$200.00 To $249.99	8.6
$250.00 And Over	14.6
Don't Know	1.9
TOTAL	100.0%
Average Expenditure	$136.35

The average expenditure reported per respondent was $136.35 per shopping trip.

D. ITEMS PURCHASED

Hispanic shoppers who crossed the border to shop at one of four San Diego shopping malls were also asked to identify the types of articles they came to purchase the day they were interviewed.

The most frequently mentioned article purchased was clothing and shoes, the reported purchase of approximately 79.0% of the respondents. The next highest incidence of item purchased was food or groceries by 44.3%, followed by home appliances, by 26.8% and electrical appliances, by 10.4% of the total sample.

ITEMS INTENDED TO PURCHASE
BY HISPANICS WHO CROSS THE BORDER

	Percent
Clothing/Shoes	**78.9%**
Food/Groceries	**44.3**
Home Appliances	26.8
Electrical Appliances	10.4
Auto Parts	3.1
Cosmetics/Perfumes/Toiletries	2.5
Furniture	2.5
Movies/Tapes/Records	1.9
Stationary/Gifts/Cards/Gift Wrap	1.5
Womens' Accessories/Jewelry	1.0
Gasoline/Oil/Service Station	0.9
Hair Styling/Cuts/Beauty Salon Needs	0.7
Construction Materials	0.6
Toys and Games	0.4
Housewares/Cooking Utensils/ China/Glassware	0.3
Specials and Sales	0.3
Flowers/Plants/Gardening Items	0.3
Towels//Curtains/Linen	0.1
Other	1.5
Just Visiting, Not Shopping	0.9
TOTAL	*

* Multiple Response

No other type of purchase had an incidence higher than the 3.1% reported for auto parts.

E. PATRONAGE OF FAST FOOD RESTAURANTS DURING SHOPPING TRIP

A follow-up question concerning purchases made while in San Diego asked respondents if the usually eat at a fast food restaurant when crossing the border for a shopping trip in the San Diego Area. As shown on the following table, the vast majority (80.1%) of these respondents answered this question affirmatively.

INCIDENCE OF
FAST FOOD RESTAURANT PATRONAGE
AMONG HISPANICS WHO CROSS THE BORDER

	Percent
Yes	80.1%
No	19.9
TOTAL	100.0%

XIV. EXECUTIVE SUMMARY

- The San Diego ADI, which encompasses San Diego County, ranks 13th among the top 33 Hispanic ADIs in terms of U.S. Hispanic population.
- The 1989 Hispanic population of the San Diego ADI is estimated at 473,800, or 17.7% of the area's total population.
- The Hispanic population in San Diego has grown 72.2% in the past nine years.
- There are an estimated 119,800 households in the San Diego ADI headed by Hispanics. Hispanic households represent approximately 12.4% of all area households.
- The average household size among Hispanics in San Diego is higher than that of non-Hispanics (3.9 persons vs. 2.6 persons).
- Virtually all Hispanics in the San Diego area are of Mexican origin or ancestry (96%).
- Approximately four out of every five Hispanics in San Diego (79.5%) are foreign-born, while 20.5% were born in the United States.
- The average length of residency of Hispanic heads of household in the United States is 15 years, 3 months; the average length of residency in the San Diego area is 11 years, 9 months.
- The average age for San Diego Hispanics is 24.4 years. Approximately 38% of the San Diego Hispanic market is under 18 years of age, while 34% are between the ages of 18 and 34.
- Nearly one-third of San Diego Hispanics hold white collar jobs; one-half are employed in blue collar positions.
- Ninety percent of the Hispanic households in San Diego have one or more members who are employed either full-time or part-time. Currently there are an average of 1.8 persons employed in each household.
- A total of 215,640 Hispanics in San Diego are employed; 191,680 work full-time and 23,960 are part-time employees.
- One-fourth of Hispanic heads of household are high school graduates; 12% are college graduates or have had some degree of college training.
- Total annual household income for San Diego Hispanics averages $27,457. This represents an adjusted annual buying power for Hispanics of $2.8 billion in the San Diego area.
- Nine out of ten Hispanics in the San Diego area first learned to speak Spanish (91.4%).
- Spanish is the primary language of Hispanics at home and on social occasions (61.6% and 60.5%, respectively).

- Overall, San Diego Hispanics are relatively fluent in their native tongue.

ABILITY TO SPEAK/READ/WRITE
"VERY WELL/WELL" RESPONSES

Speak		Read		Write	
Spanish	English	Spanish	English	Spanish	English
79.2%	36.9%	78.4%	41.1%	73.5%	36.5%

- Hispanics attach great importance to preserving their language: 94% feel that it is very important for their children to read and write Spanish perfectly.
- In addition to language, Hispanics emphasize the importance of traditional cultural values and show pride in their heritage. Aspects such as enjoyment of Latin music and preservation of traditions are instances of continuing identification with their culture.
- Nearly nine out of ten Hispanics patronize American chain supermarkets most often. Weekly food expenditures at chain supermarkets average $77.37. Annually, this figure calculates to $4,023.24.
- More than three-fourths (76.9%) of Hispanics patronize convenience stores. A total of 13.1 visits per month are made on average.
- In the past month, 67.9% of Hispanics patronized a discount store, 59.5% shopped at a drug store, and 42.3% made purchases at a department store.
- More than two-thirds of Hispanics shopped at an enclosed shopping mall in the past month. On average, Hispanics frequent enclosed shopping malls 2.1 times per month.
- Overall, San Diego Hispanics patronize fast food restaurants quite frequently.

FAST FOOD CONSUMPTION/FREQUENCY

	Yes, Eat	Times Per Month
Hamburger	88.3%	5.4
Chicken	84.0	5.0
Pizza	77.9	3.4
Mexican	72.5	8.9

- Two-thirds of Hispanics also eat at non-fast food restaurants with table service.
- Nearly nine out of ten Hispanics in San Diego drink carbonated soft drinks (88.0%) and 53.6% also drink beer.
- The majority of Hispanic households have at least one car, truck or van (89.5%). The average number of vehicles per household is 2.0.
- Thirty-nine percent of Hispanics own their own home, while 60.8% rent.
- One-fourth of those who currently rent and 17% of those who are homeowners plan to buy a home within the next year.

- Nearly all Hispanic households have a television set (97.7%); two-thirds have a stereo (67.5%) and one-half have a VCR (59.9%). Microwave ovens can be found in 43.1% of Hispanic households in San Diego.

- Nearly one-half of all television-owning households have cable television service (47.8%).

- Fifty-four percent of Hispanic households currently maintain a savings account and 48% have a checking account.

- One-third of all Hispanic households have at least one pet.

- Nearly nine out of ten Hispanics watch Spanish-language television. An average of 15.4 hours per week are spent watching.

- Seventy-nine percent of Hispanics listen to Spanish-language radio, with an average frequency of 12.9 hours per week.

- A total of 42.4% of San Diego Hispanics read Spanish-language periodicals. Approximately 5.9 hours are spent in a typical week reading these magazines and newspapers.

- Local news information is obtained primarily from television (86.2%); 9.5% of Hispanics listen to the radio and 4.3% read the newspaper.

- Almost one-half of San Diego's Hispanics traveled by car the last time they took a trip outside the area (49.4%) while one-fourth traveled by airplane.

- Nearly two-thirds of Hispanics stated that their primary purpose for travel was for pleasure or vacation, 7.8% traveled for business.

- Hispanics in the San Diego area go to the movies quite frequently -- approximately once a month.

- A total of 88.5% of non-San Diego Hispanic residents cross the border to shop in San Diego. Hispanics who cross the border from Tijuana or other neighboring cities do so approximately 6.7 times per month.

- The average expenditure per shopping trip is $136.35.

- Clothing and food are the two primary product categories which border crossing Hispanics come to buy.

- Eight out of every ten Hispanics who cross the border to shop in San Diego eat at a fast food restaurant during their shopping trip.

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